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ABSTRACT

This training manual describes new features the U.S. Department of Education has developed to improve the administration of the Pell Grant program. It explains how to set up the electronic data transfer system EDExpress for processing Pell Grant information. Six online resources are described to help the institution's financial aid office use EDExpress to administer Pell Grant processing. The learner is provided opportunities to practice creating queries with the EDExpress software and is introduced to techniques for building the database for financial aid. It also shows how reports can help the institution resolve errors and suggests ways to maintain and track student financial aid records. (SLD)

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HE

ED 465 322

# EDExpress Training

## Pell Grants

## 2002 - 2003

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## Participant Guide

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FEDERAL
STUDENT AID

FSA
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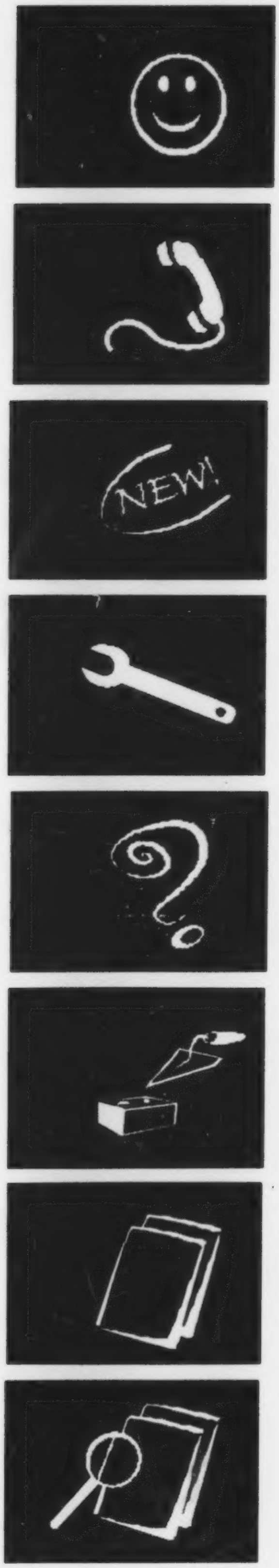
FEDERAL STUDENT AID

# 2002-2003 EDExpress Pell Training



FSA
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Form approved
OMB #1880-1529
Exp. date 11/30/2003

SFA
UNIVERSITY
STUDENT FINANCIAL ASSISTANCE

# STUDENT FINANCIAL ASSISTANCE
## Training Satisfaction Survey

DEPARTMENT OF EDUCATION
UNITED STATES OF AMERICA

Thank you for taking a moment to answer the following questions. We will use this to evaluate and improve our training and materials. Any information you provide is confidential.

Course ______________________________ Date __________

Location ______________________________

Trainer name(s) ______________________________

Your type of institution: ☐ Public ☐ Private ☐ Proprietary
☐ Undergraduate/Graduate ☐ Clock Hour/Credit Hour

Length of time in financial aid related responsibilities: (years/months) __________

Please complete the following statements using the scale below:

**1 = Unacceptable**
**2 = Poor/less than acceptable**
**3 = Moderate/Acceptable**
**4 = Good/More than acceptable**
**5 = Outstanding/Much more than acceptable**
**N/A = Not applicable/Unknown/No Comment**

## GENERAL

1. How well did this training meet your needs for improving your student aid operations?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

2. How well did this training meet the overall objectives stated at the beginning of the course?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

3. How well did the training announcement describe this training?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

## TRAINING MATERIALS

4. How helpful were the case studies, charts and other graphic illustrations?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

5. Our goal is to provide accurate, clear and organized materials. How do you rate our materials?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

## PRESENTATION

6. Please rate the presentation and/or slide show for clarity and accuracy.
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

7. Was enough time devoted to trainee questions and exercises?
☐ Yes ☐ No

8. What suggestions do you have to improve the trainers' presentation?

## TRAINING LOGISTICS AND MISCELLANEOUS

9. What additional training would you like us to provide?

10. What comments do you have about the workshop's location and training room?

## ADDITIONAL COMMENTS AND SUGGESTIONS

You can now provide your comments on this or any other training session on our Training Information page at www.ed.gov/offices/OSFAP/sfau/ or by sending us an e-mail at SFA_Training@ed.gov

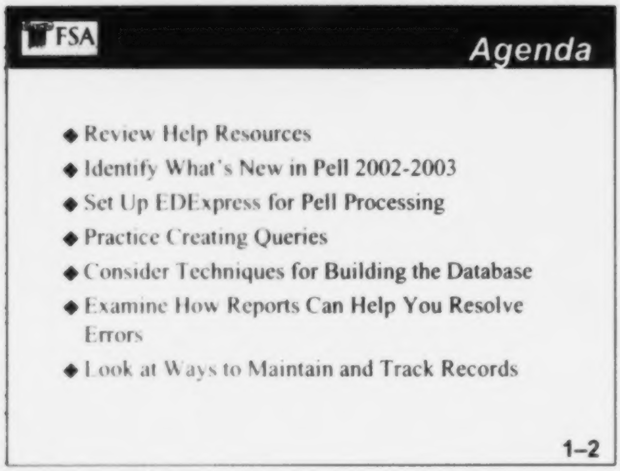
# *Welcome*

# Session 1—Welcome

FSA

## Objectives

- ◆ Review Agenda
- ◆ Review Logistics & Training Materials
- ◆ Establish Agreements
- ◆ Get to Know Each Other



FSA

## Agenda

- Review Help Resources
- Identify What's New in Pell 2002-2003
- Set Up EDExpress for Pell Processing
- Practice Creating Queries
- Consider Techniques for Building the Database
- Examine How Reports Can Help You Resolve Errors
- Look at Ways to Maintain and Track Records

1–2

# *Welcome to "EDExpress Pell 2002–2003"*

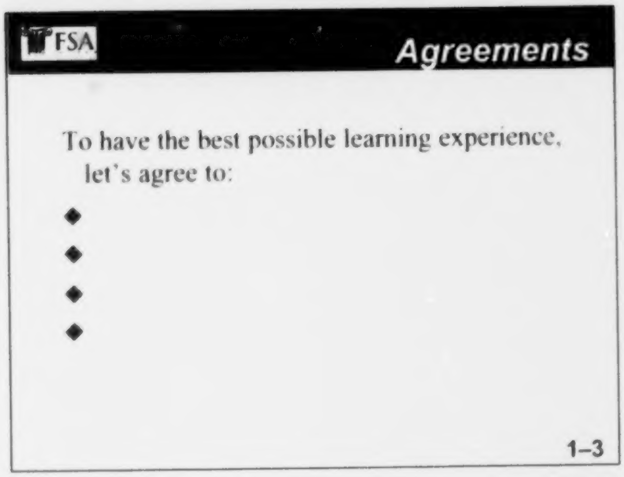
Today we will examine the new features the Department of Education has developed. This session will teach you how to administer and manage your school's Pell Program more efficiently and how the new features affect this year's EDExpress Pell module.

If you have questions about the agenda, jot them down and bring them to the trainer's attention.

1. ______________________________

2. ______________________________

8



FSA

## Agreements

To have the best possible learning experience, let's agree to:

◆

◆

◆

◆

1–3

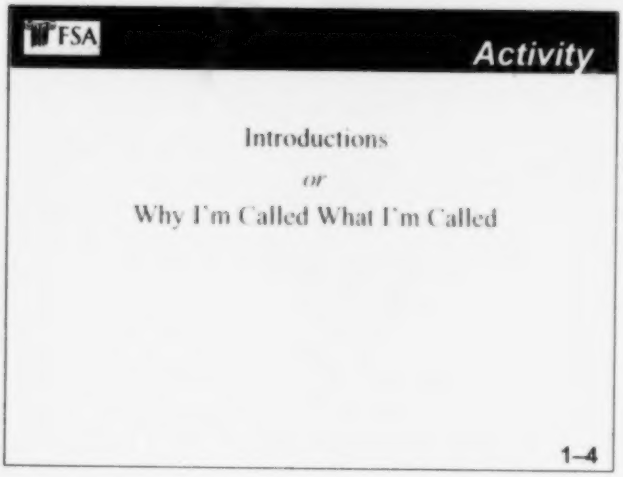
## Agreements

Let's come up with learning guidelines to make this the most successful learning experience possible! Write down a few suggestions that you think will be helpful, and be ready to share them.

1. ______________________________

2. ______________________________

3. ______________________________



FSA Activity

Introductions

*or*

Why I'm Called What I'm Called

1–4

## *Learning Activity*

Objective:

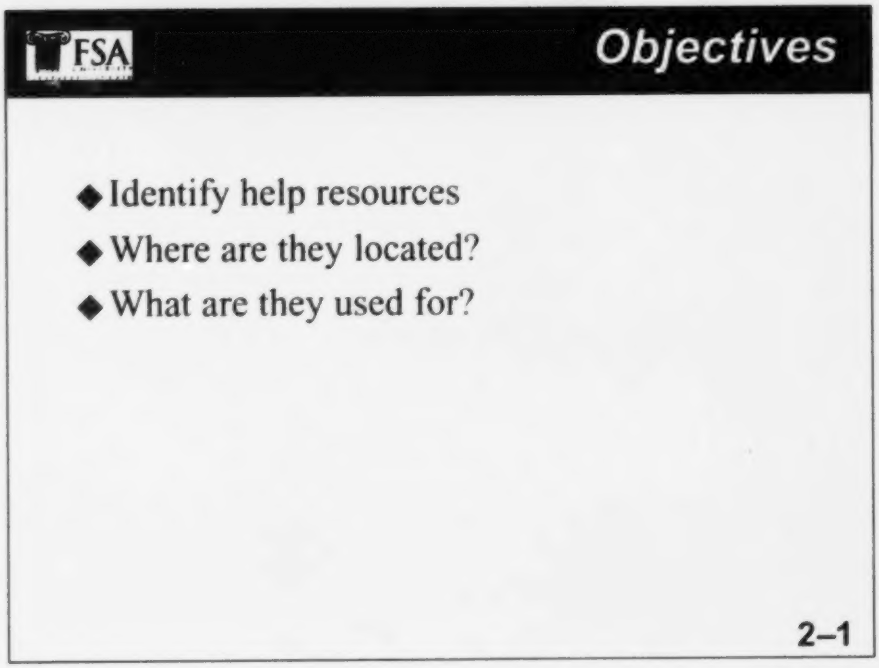
- Meet your colleagues.

Instructions:

1. Each of us will introduce ourselves.
2. In order to help us remember each other's names, we will reveal what we think is most interesting about our names.

# *Getting Help*

# Session 2: Getting Help



## Objectives

- ◆ Identify help resources
- ◆ Where are they located?
- ◆ What are they used for?

# Key Terms

## COD System

Common Origination and Disbursement. This system replaces RFMS as the Pell processing system. As such, all schools participating in Title IV student financial assistance programs are using COD for the 2002–2003 processing cycle. Schools will be either Full Participants or Phase-In Participants; most schools will fall under the Phase-In Participant model.

## Full Participant

Used in reference to COD, schools that are Full Participants send the common record in XML format for 2002–2003 records and adopt the common record change process.

## GAPS

Grants Administration and Payment System. The system used by ED to process school-specific Title IV award obligations and to make payments against those obligations. GAPS interfaces directly with U.S. Treasury's Federal Reserve System

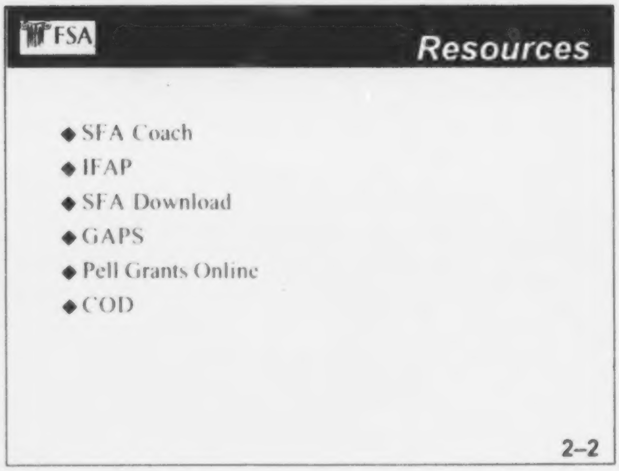
## IFAP

Information for Financial Aid Professionals. IFAP is a Web site for financial aid professionals, banks, lenders, institutions, and guarantee agencies. The IFAP online library contains technical publications, regulations and policy guidance on the administration of the federal student financial assistance programs.

## Phase-in Participant

All EDExpress users use this processing model. Communicating over the Student Aid Internet Gateway (SAIG), Phase-in Participant schools use the "legacy" record formats, which are defined in the *Federal Pell Grant Program Technical Reference*. This has been the standard model of processing for the last several years.

Phase-in Participant schools are phasing in to COD by continuing to send the student information via legacy-record formats in 2002–2003. Phase-in Participant schools will be COD schools and will see changes in processing even though they will continue to send legacy records.



FSA

## Resources

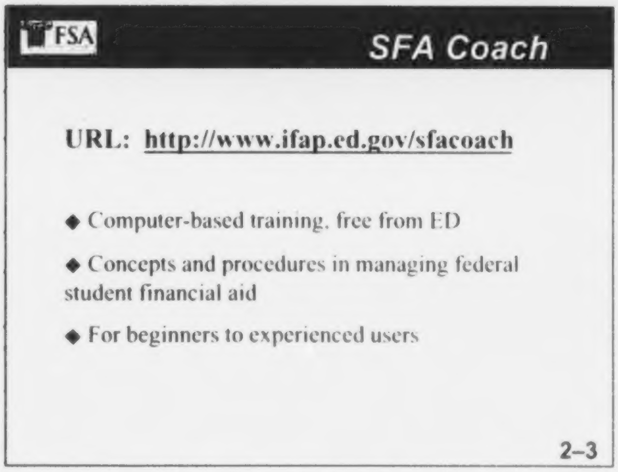
- SFA Coach
- IFAP
- SFA Download
- GAPS
- Pell Grants Online
- COD

## Resources: An Overview

In this session, we discuss six online resources to help you use EDExpress to administer your Pell Grant processing:

- SFA Coach
- IFAP
- SFA Download
- GAPS
- Pell Grants Online
- COD

**Note:** Appendix E in this participant guide contains screenshots of all Web sites referred to in this section.



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SFA Coach

URL: http://www.ifap.ed.gov/sfacoach

- ◆ Computer-based training, free from ED
- ◆ Concepts and procedures in managing federal student financial aid
- ◆ For beginners to experienced users

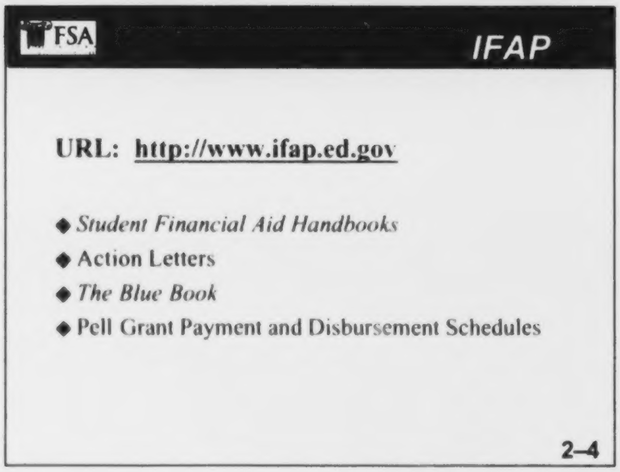
2–3

## SFA Coach

### URL: http://www.ifap.ed.gov/sfacoach/

The SFA Coach is a free, computer-based training program from the U.S. Department of Education (ED). It is a comprehensive introductory course that teaches the concepts and procedures involved in managing federal student aid (FSA) programs authorized under Title IV of the Higher Education Act. SFA Coach is currently software that runs on your PC after you download it from the Web. In July 2002, you will be able to run SFA Coach from the Internet without downloading software.

WORKS WITH YOU!



FSA

**IFAP**

**URL: http://www.ifap.ed.gov**

- *Student Financial Aid Handbooks*
- Action Letters
- *The Blue Book*
- Pell Grant Payment and Disbursement Schedules

2–4

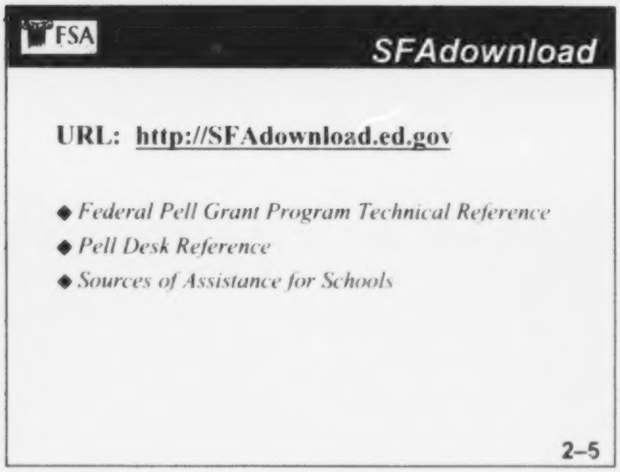
## Information for Financial Aid Professionals Web site

### URL: http://www.ifap.ed.gov

IFAP is a site for financial aid professionals, banks, lenders, institutions and guarantee agencies. The IFAP online library contains technical publications, regulations and policy guidance on the administration of the federal student financial assistance programs.

### What Documents Can You Find on IFAP?

- *Student Financial Aid Handbooks*
  - Volume 3, Pell Grants: Policies and procedures for awarding and disbursing Pell Grants
  - Application and Verification Guide: Policies and procedures for completing the verification process
- Action letters
- *The Blue Book:* Provides guidance to school business office personnel who handle fiscal accounting, recordkeeping, and reporting functions for federally funded student financial aid programs.
- Pell Grant Payment and Disbursement Schedules



FSA

## SFAdownload

URL: http://SFAdownload.ed.gov

- *Federal Pell Grant Program Technical Reference*
- *Pell Desk Reference*
- *Sources of Assistance for Schools*

2–5

## SFAdownload Web site

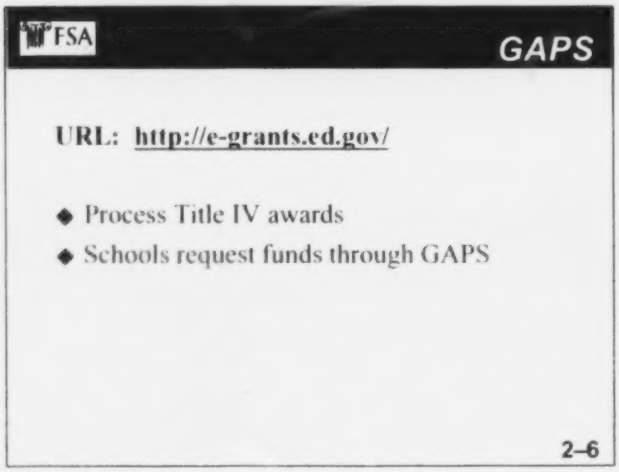
### URL: http://SFAdownload.ed.gov

SFAdownload is a U.S. Department of Education Web site for downloading personal computer software, such as EDExpress, EDConnect, Quality Analysis Tool, and Return of Title IV Funds. It also provides technical and user documentation that support these software packages.

Documents are provided in both Adobe PDF and MS Word formats.

### What Documents Can Be Found on SFAdownload?

- *Federal Pell Grant Program Technical Reference:* Provides record layouts for software developers and mainframe schools. It also provides an explanation of the edit codes received on origination and disbursement acknowledgement records. From the SFAdownload main menu, select "References & Documentation" to access the *2002–2003 Federal Pell Grant Program Technical Reference.*
- *Pell Desk Reference*: Provides step-by-step instructions for completing certain tasks in the Pell module of EDExpress. From the SFAdownload main menu, select "Software," then "EDExpress 2002–2003 Version 8.1" to access the *Pell Desk Reference*.
- *Sources of Assistance for Schools:* Contains all of the Department's latest Web sites and contact numbers—updated on an as-needed basis. From the SFAdownload main menu, select "References & Documentation" to access the *Sources of Assistance for Schools.*



FSA

**GAPS**

URL: http://e-grants.ed.gov/

◆ Process Title IV awards

◆ Schools request funds through GAPS

2–6

## GAPS

## URL: http://e-grants.ed.gov

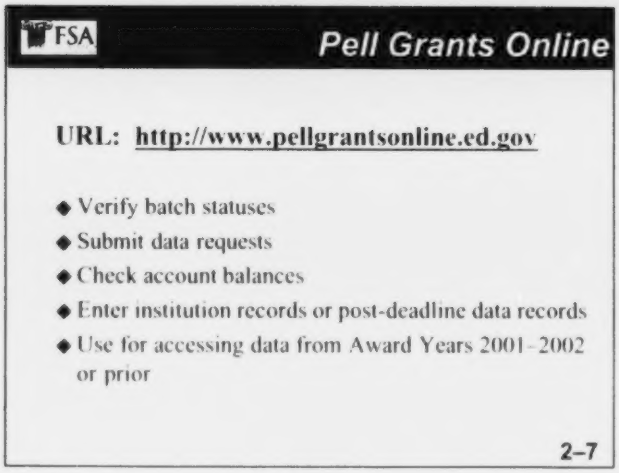
Grants Administration and Payment System (GAPS) is the system used by ED to process school-specific Title IV award obligations and to make payments against those obligations.

GAPS is part of EDCAPS and interfaces directly with U.S. Treasury's Federal Reserve System.

GAPS houses the complete grant cycle.

Under GAPS, schools can request funds for each student financial aid program using the program and fiscal year designation that ED has assigned to the authorized funds.

- Initiate Payment Requests and Refunds
- Print Activity Reports
- Check Available Balances
- View Payment Requests



FSA

### Pell Grants Online

URL: http://www.pellgrantsonline.ed.gov

- Verify batch statuses
- Submit data requests
- Check account balances
- Enter institution records or post-deadline data records
- Use for accessing data from Award Years 2001–2002 or prior

2–7

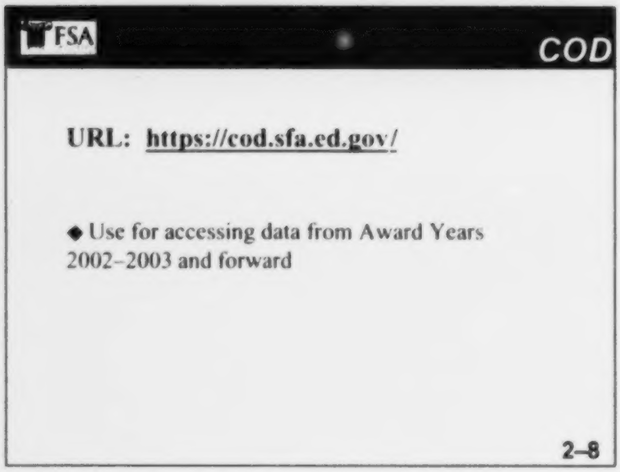
## *Pell Grants Online (Federal Pell Grant Program Web Site)*

## *URL: www.pellgrantsonline.ed.gov*

For Award Year 2001–2002 and earlier data, use this Web site to verify batch statuses, submit data requests, check account balances, enter institution records, or enter post-deadline data records via the Internet. It also includes your:

- Authorization Level for Award Years 1999–2000 and forward, and
- Batch Status for Award Years 1999–2000 and forward.

It also contains an online glossary of key Pell Grant terms, which is an excellent resource.



FSA

COD

URL: **https://cod.sfa.ed.gov/**

◆ Use for accessing data from Award Years 2002–2003 and forward

2–8

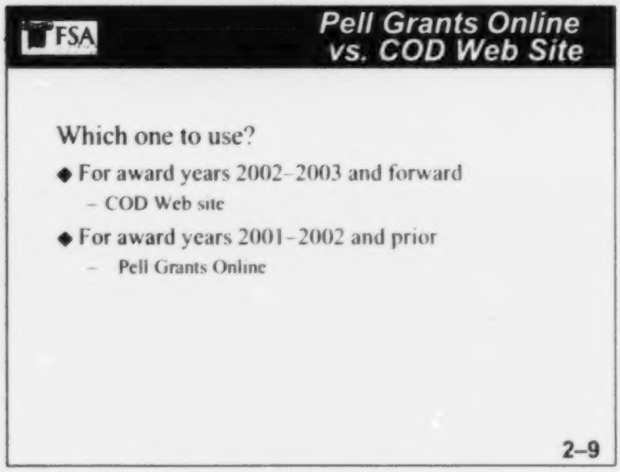
## COD (Common Origination and Disbursement) Web Site

### URL: https://cod.sfa.ed.gov/

For 2002–2003, the Common Origination and Disbursement System replaces RFMS; so, for accessing data from Award Years 2002–2003 and beyond, you will need to use the COD Web site.

Use this site to:

- Search for a student by name or SSN
- Search for a school
- Search for and modify a current award (Full Participants only can also create a new award)
- Search for existing batches to modify



FSA

Pell Grants Online vs. COD Web Site

Which one to use?

- For award years 2002–2003 and forward
  - COD Web site
- For award years 2001–2002 and prior
  - Pell Grants Online

2–9

## Pell Grants Online versus COD Web site

### Which one should I use?

- For Award Year 2001–2002 and before data, use the Pell Grants Online Web site.
- For Award Year 2002–2003 and beyond data, use the COD Web site.

# Individual Learning Activity: #1

## Finding the Information You Need

### *Scenario*

When you get to work this morning, you have a voice message from the associate director in your office saying that she does not understand edit code 331, which appeared on an origination acknowledgement record that was received yesterday.

### *Instructions*

Using the resources on the Web, find the definition of edit code 331.

Hints:

There is more than one document in which you can find this answer.

The definition is in Appendix D of one of the documents.

### *Discussion*

1. What is the answer to your associate director's question?

   __________________________________________________

   __________________________________________________

2. What document did you use to get your answer?

   __________________________________________________

3. Which Web site did you use to locate that document?

   __________________________________________________

# Individual Learning Activity: #2

## Finding the Information You Need

### Scenario

You are in charge of handling all Pell origination records for your school. You realize a mistake was made in entering some student's origination data, and you need to correct it.

### Instructions

Using the resources on the Web, find step-by-step instructions for entering a correction to an origination record.

### Discussion

1. What document did you use to get your answer?

   __________________________________________________________

2. Which Web site did you use to locate that document?

   __________________________________________________________

# Individual Learning Activity: #3

## *Instructions*

How well do you know the resources available to you?

Match the information needed on the left with the resource on the right by drawing a line. The first one has been completed for you.

**Information Need**

1. Full description of eligibility requirements for the Pell Grant program.
2. Description of how to calculate excess cash and interest earnings on Title IV aid funds.
3. Status of 2001–2002 Pell Grant batches
4. Amount of Pell Grant award for a full-time student with an EFC of 200 and cost of attendance of $17,000.
5. Total amount of 2002–2003 accepted Pell Grant disbursements for Jack Jones
6. The telephone number for FSA's Philadelphia Case Management team.
7. The length (in bytes) of the Pell Grant disbursement acknowledgement record.
8. The step-by-step instructions for setting up a reporting campus in EDExpress.

**Resource**

IFAP: *The Blue Book*

IFAP: *Student Aid Handbook*

IFAP: Pell Payment Schedule

SFAdownload: *Federal Pell Grant Program Technical Reference*

SFAdownload: *Pell Desk Reference*

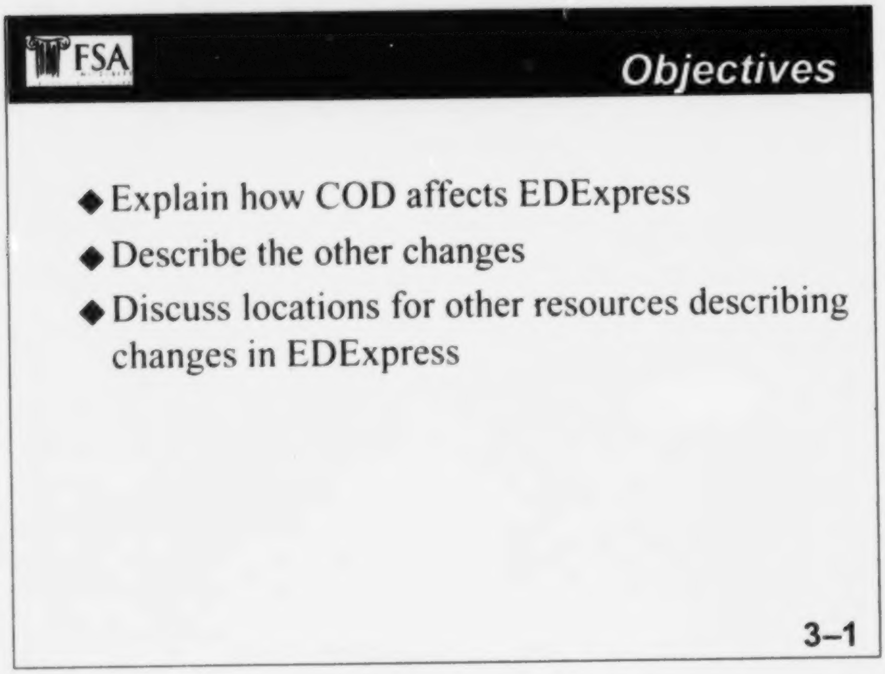
SFAdownload: *Sources of Assistance for Schools*

Pell Grants On-Line

COD

# *What's New*

# Session 3—What's New?



## Objectives

- Explain how COD affects EDExpress
- Describe the other changes
- Discuss locations for other resources describing changes in EDExpress

# Key Terms

## Current SSN

Two Social Security Number fields are carried on the student's record: Current SSN and Original SSN. The Current SSN is the most recently reported Social Security Number. It will always equal the Original SSN, unless the student corrects the SSN.

## Multiple Entry

An EDExpress feature that allows you to update various fields in demographic, packaging, loan, and Pell records for multiple students at one time.

## Original SSN

The Original SSN is the Social Security Number the student first reports to the CPS. It never changes. If the student corrects the SSN, the corrected SSN is the Current SSN.

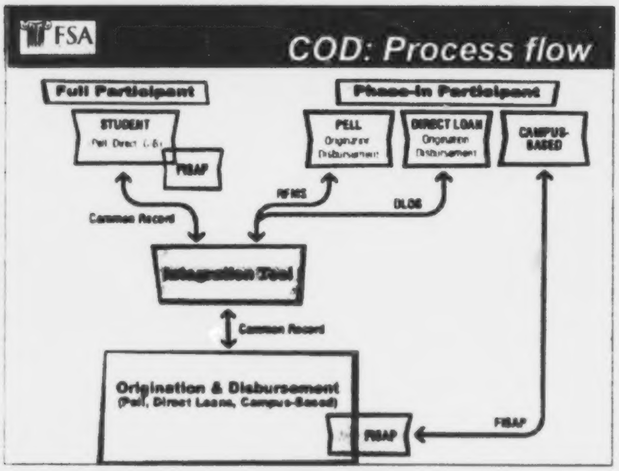
## Origination Record

Is used to report to the Pell Processor that the school intends to make a Pell Grant payment to a particular student.

## Record Source

This EDExpress Pell field displays the source of the data used to initially create the student's Pell record:

| | |
|---|---|
| E | External Import |
| I | ISIR Created |
| M | Manually Created |
| P | Packaging |
| O | Pell Origination Acknowledgement |
| W | Pell Origination Acknowledgement—Web |
| X | Pell YTD Rebuild |



FSA

COD: Process flow

Full Participant
Phase-In Participant
STUDENT
Pell Direct CB
FISAP
PELL
Origination
Disbursement
DIRECT LOAN
Origination
Disbursement
CAMPUS-BASED
RFMS
DLOS
Common Record
Integration Tool
Common Record
Origination & Disbursement
(Pell, Direct Loans, Campus-Based)
FISAP
FISAP

## Common Origination and Disbursement (COD)

COD provides a common process and an integrated system that enables efficient Title IV funds delivery. COD allows for:

- Common processing, including the elimination of duplicate student data reporting for Pell Grants and Direct Loans;
- Streamlined edits to reduce turnaround time for exception processing; and
- Expanded online capability to make corrections, process "emergency" requests, and check transmission status.

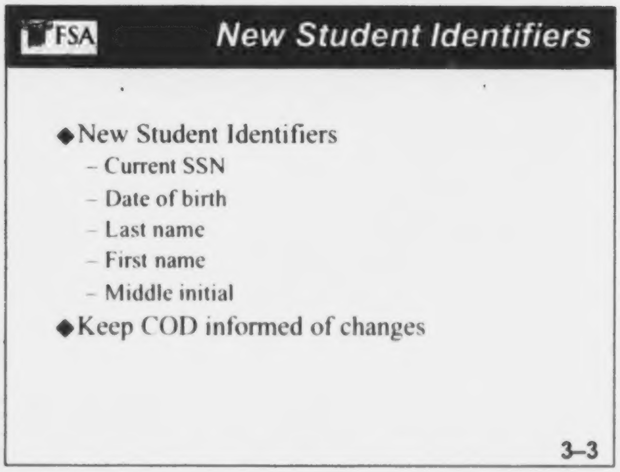
In short, the COD process is a more simplified process for requesting and reporting data.

## Full and Phase-In Participants

In 2002–2003, schools participate as either Full or Phase-In Participants. Full Participants are required to submit all Pell Grant and Direct Loan data in a Common Record format. Phase-In Participants (the majority of schools in 2002–2003) continue to submit separate records for the separate Title IV programs. These records are reformatted into the common record format through an integration tool.

EDExpress in 2002–2003 supports the needs of Phase-In Participants. While the majority of the changes brought about by COD are "behind the scenes," you need to know about a number of minor, but important, changes in EDExpress brought about by the requirements of COD. These changes are discussed in the following pages.

BEST COPY AVAILABLE



FSA New Student Identifiers

- New Student Identifiers
  - Current SSN
  - Date of birth
  - Last name
  - First name
  - Middle initial
- Keep COD informed of changes

3–3

## New Student Identifiers

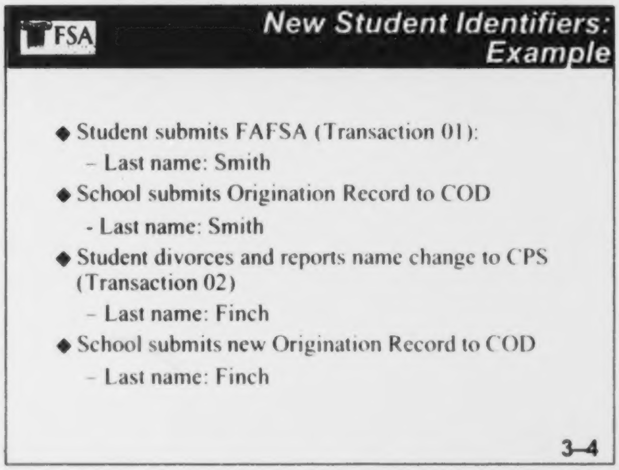
The Current SSN, Date of Birth, Last Name, First Name, and Middle Initial are the student identifier fields for the new COD system. The data is already stored in EDExpress on the Demo tab screen; therefore no new entries are required from schools.

## How Does Change Affect Me?

You should keep the COD system updated when the student reports any changes to these fields to the CPS.

The Current SSN, Date of Birth, and Last Name are used to tie student information in the COD with student information in CPS. If the student reports a change in any of these fields to the CPS, schools should report the change to the COD by re-originating the student with the new CPS transaction number.

Note that the new student identifiers do not alter the elements that make up the Origination ID. The elements are still the Original SSN, Name Code, Year Indicator, Attended Campus Pell ID, and Origination Sequence Number (constant 00).



FSA

**New Student Identifiers: Example**

- Student submits FAFSA (Transaction 01):
  - Last name: Smith
- School submits Origination Record to COD
  - Last name: Smith
- Student divorces and reports name change to CPS (Transaction 02)
  - Last name: Finch
- School submits new Origination Record to COD
  - Last name: Finch

3–4

## Changes in the New Student Identifiers: An Example

Let's look at an example.

1. Jennifer Smith, a second year student at Arlington Community College, files her FAFSA in February 2002 for the 2002–2003 award year. An ISIR with an 01 Transaction Number is transmitted to her school.
2. Arlington CC submits a Pell Grant origination record for her in July, using identifying information from her 01 ISIR transaction.
3. Jennifer Smith divorces her husband and formally assumes her maiden name of Finch in the summer of 2002. She submits a corrected Student Aid Report in August; she reports her name change, as well as other corrections to her financial information. Her school receives an 02 ISIR transaction.
4. Arlington CC submits a new origination record based on the 02 ISIR transaction that informs COD of the change in the student's last name.

FSA

## New Student Identifiers: Changes to EDExpress

- ◆ Edit for missing date of birth
- ◆ New origination record edit codes
- ◆ New message class to report student identifier discrepancies: PGSN03OP

# New Student Identifiers: Changes to EDExpress

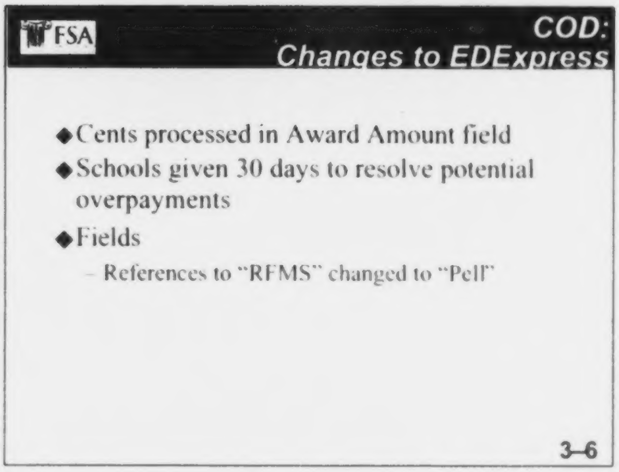
The new components of the student identifier (Current SSN, Date of Birth, Last Name, First Name, and Middle Initial) are saved to the EDExpress database and exported to the Pell processor as part of the student's origination record. They are also imported from the Origination Acknowledgement record. The new student identifier fields are also now a part of the Data Request Record. These fields are required to export a Data Request for individually selected students.

Whenever you save an origination record, EDExpress edits the student's date of birth, which is displayed on the Demo screen, to make sure that it is present. EDExpress will not save and mark the origination record as being ready for transmission until a valid date of birth is provided.

The Pell processor now edits to make sure that the student identifiers on the origination record match the data supplied by the CPS. If the identifiers do not match, one or more of the following edit codes are returned on the origination acknowledgement record:

| | |
|---|---|
| • Edit 332 | Current SSN |
| • Edit 333 | Date of birth |
| • Edit 334 | Last Name |
| • Edit 335 | First Name |
| • Edit 336 | Middle Initial |

In addition, the Pell processor returns a new message class to the school called PGSN03OP. From this message class, a preformatted report may be printed. This report lists discrepancies in the SSN, name, and date of birth fields between what is transmitted by the school to the Pell processor and what is provided by the CPS. Note that the EDExpress database is not updated when you import this message class.



COD: Changes to EDExpress

- ◆Cents processed in Award Amount field
- ◆Schools given 30 days to resolve potential overpayments
- ◆Fields
  - References to "RFMS" changed to "Pell"

3-6

## Cents Allowed in Award Amount

Also new for 2002–2003 is the ability to report cents to the Pell processor in the Award Amount for the Entire School Year field on the origination record and have the cents returned to your school on the acknowledgment record. For schools who still elect to report whole dollars, the cents will be zero filled after the implied decimal place in EDExpress.

## Potential Overpayment Project (POP)

Potential Overpayments occur when the Pell processor receives disbursements from two or more schools that exceed the student's total payment ceiling for the year. The Pell processor returns a Multiple Reporting Record (MRR) to the school with information about the other school(s) who has also paid the student. The Pell processor also places edit code 411 on the disbursement acknowledgement record notifying the school of the potential overpayment.

In 2002–2003, schools have 30 days from the date that the MRR was generated to contact the other school(s) and resolve the problem. If the student is still in an overpaid status after 30 days, the Pell processor will generate a "Negative Disbursement" to each school and all previously accepted disbursements for the student would be adjusted down to zero at both schools. The eligible school(s) will then be able to resubmit positive disbursements to recover their Pell funds.

## Field Labels

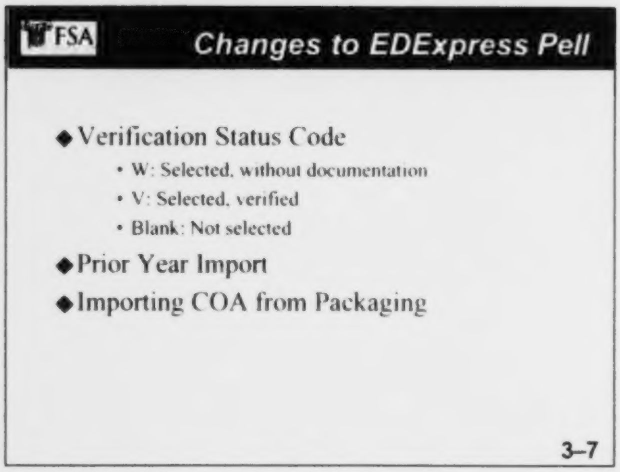
Because COD will be the Pell Grant processor for 2002–2003, all references to "RFMS" have changed to "Pell Processor" or just "Pell" when space would not allow. For example:

- On the Origination and Disbursement export files, "RFMS" is removed from the title.
- On the display screen for Pell Originations, "RFMS Status" has changed to "Pell Action Status."
- On the display screen for Pell Disbursements;
  - "Payment Period" column heading has changed to "Pay Period."
  - "Action" has been added to the "Status" column label and "RFMS" has changed to "Pell." The column heading is now "Pell Action Status."
  - "RFMS YTD Total" has changed to "Pell Processor YTD Total."

# Individual Learning Activity: #1

## *Instructions*

Now let's try an exercise to see how much you've learned about the COD process.
Double click the icon on your desktop called "COD Puzzle." Follow the directions. You'll come to a screen with out-of-order pieces of the COD diagram we saw earlier. Your goal is to create a logical flow chart of the process by using your mouse to drag and drop the pieces of the puzzle. If you make a mistake, the puzzle piece returns to its starting position. If you are correct, the puzzle piece stays in place in its new position. Take a few minutes to work on this, and have fun!



FSA

## Changes to EDExpress Pell

- ◆Verification Status Code
  - W: Selected, without documentation
  - V: Selected, verified
  - Blank: Not selected
- ◆Prior Year Import
- ◆Importing COA from Packaging

3–7

Other enhancements have been made to EDExpress that are not directly related to COD.

## Verification Status Code

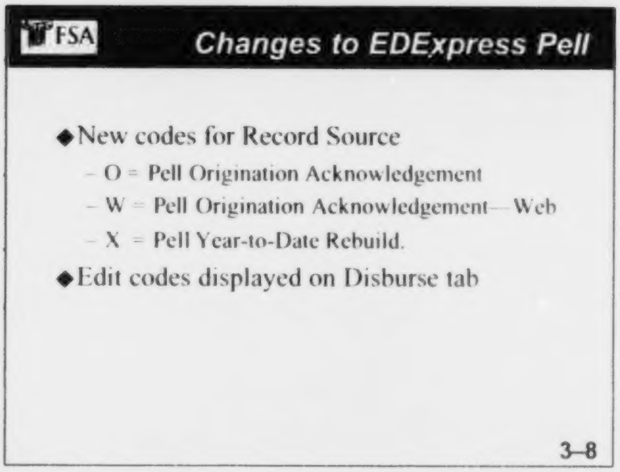
Only three codes will be used to report the status of records that are selected for verification either by the Central Processing System (CPS) or by the school. Verification Status codes for 2002–2003 are V—Verified and W—Without documentation. The "Verification Status Code" field will be left blank to identify records not selected, or that you are not required to verify.

## Prior Year Import

Beginning in 2002–2003, you will be able to carry forward the School Default Flag when importing Prior Year Pell Setup information. You will also be able to select data by Attended Campus or Reporting Campus during a Prior Year Import.

## Importing COA from Packaging

A separate Pell Grant cost of attendance field has been added to the EDExpress Packaging module for 2002–2003. If you use the option to create Pell records by importing data from the Packaging module in EDExpress, the Pell cost of attendance field will automatically populate on the Pell Grant tab screen. The cost of attendance field can be modified individually on the Pell Grant tab screen or by using Multiple Entry.



FSA

## Changes to EDExpress Pell

- New codes for Record Source
  - O = Pell Origination Acknowledgement
  - W = Pell Origination Acknowledgement—Web
  - X = Pell Year-to-Date Rebuild.
- Edit codes displayed on Disburse tab

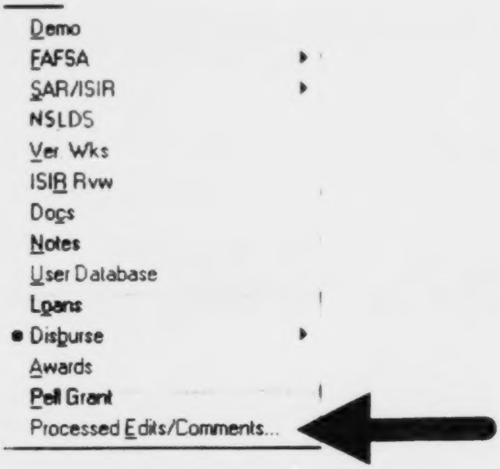
3–8

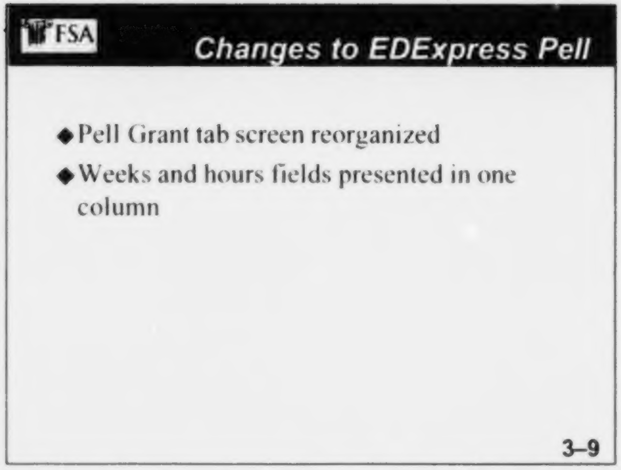
## New Codes for Record Source

New codes have been added to the Record Source field that displays on both the Demo tab screen and the Pell Grant tab screen. These values will identify how a record was created by either a traditional Origination Acknowledgement (O), an Origination Acknowledgement via the Web (W), or a Year-to-Date Rebuild (X). The corresponding column heading of the Pell Origination List has changed to "Record Source" for clarity. It was previously listed as "Origination Source."

## Edit Codes Displayed on Disburse Tab

For each disbursement transaction that provokes an edit condition of D—Duplicate, E—Reject, or W—Warning, the reason for the edit will display on the Disburse tab by selecting View, then Processed Edits/Comments from the pull-down menu.


Demo
EAFSA
SAR/ISIR
NSLDS
Ver. Wks
ISIR Rvw
Docs
Notes
User Database
Loans
Disburse
Awards
Pell Grant
Processed Edits/Comments...



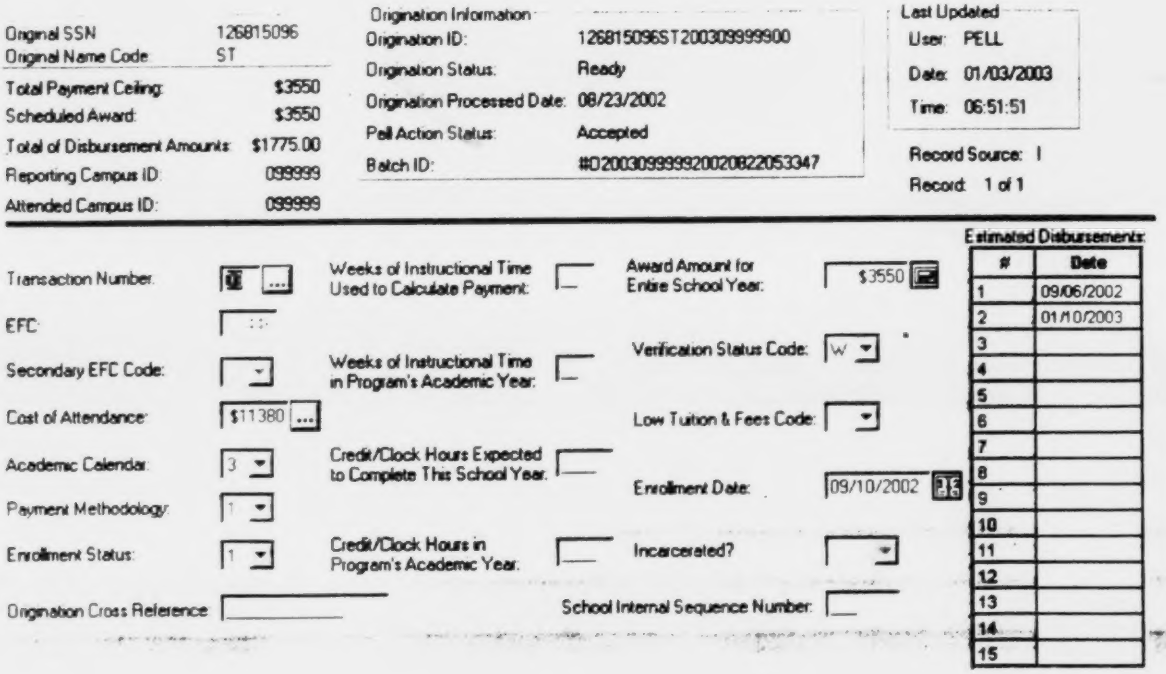
### Changes to EDExpress Pell

- Pell Grant tab screen reorganized
- Weeks and hours fields presented in one column

3–9

## Data Entry Screen Reorganized

The Pell Grant tab screen has been reorganized. Weeks and Hours fields are listed together in one column. All data elements that display on this screen are grouped in a more logical order.



Original SSN 126815096
Original Name Code ST
Total Payment Ceiling: $3550
Scheduled Award: $3550
Total of Disbursement Amounts: $1775.00
Reporting Campus ID: 099999
Attended Campus ID: 099999

Origination Information
Origination ID: 126815096ST200309999900
Origination Status: Ready
Origination Processed Date: 08/23/2002
Pell Action Status: Accepted
Batch ID: #0200309999920020822053347

Last Updated
User: PELL
Date: 01/03/2003
Time: 06:51:51

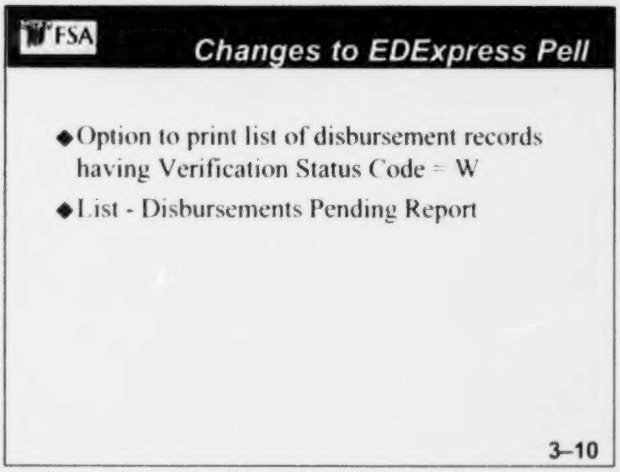
Record Source: I
Record 1 of 1

Cost of Attendance: $11380
Academic Calendar: 3
Payment Methodology: 1
Enrollment Status: 1
Award Amount for Entire School Year: $3550
Verification Status Code: W
Enrollment Date: 09/10/2002

Estimated Disbursements:

| # | Date |
|---|---|
| 1 | 09/06/2002 |
| 2 | 01/10/2003 |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |
| 11 | |
| 12 | |
| 13 | |
| 14 | |
| 15 | |

Transaction Number:
EFC:
Secondary EFC Code:
Origination Cross Reference
Weeks of Instructional Time Used to Calculate Payment:
Weeks of Instructional Time in Program's Academic Year:
Credit/Clock Hours Expected to Complete This School Year:
Credit/Clock Hours in Program's Academic Year:
Low Tuition & Fees Code:
Incarcerated?
School Internal Sequence Number:



FSA

## Changes to EDExpress Pell

- Option to print list of disbursement records having Verification Status Code = W
- List - Disbursements Pending Report

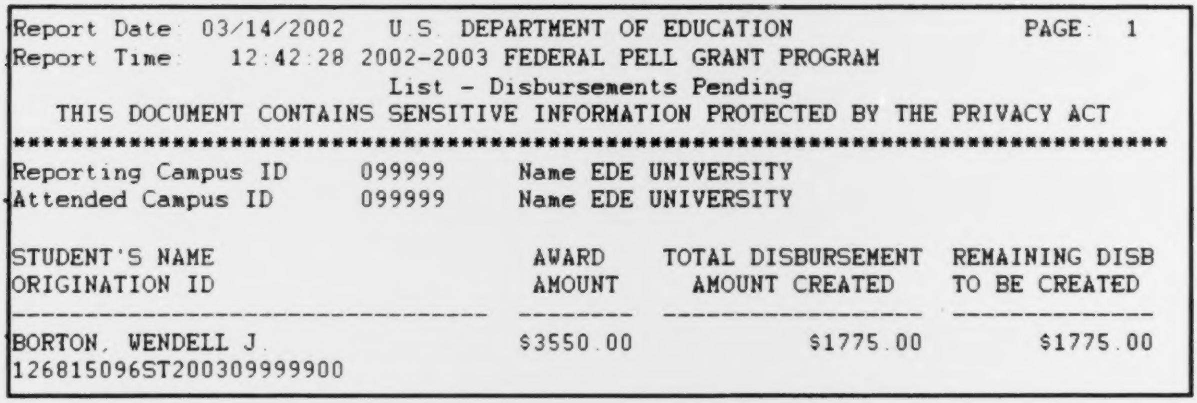
3–10

## Disbursement List Option

A new option to print Pell Grant records using the Disbursement List allows schools to identify students that have Pell Grant disbursements greater than zero and a Verification Status Code of W, meaning that verification has not been completed.

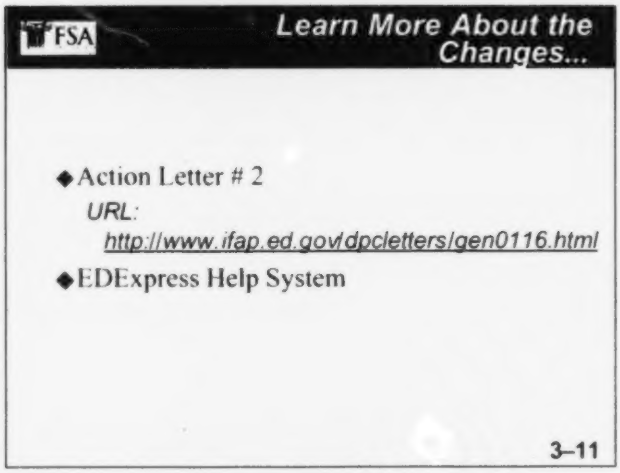
## List—Disbursements Pending Report

A new List—Disbursements Pending report has been created to assist you in tracking pending disbursements. If the amount originated is equal to the amount disbursed, the record will not be listed on this report. The report will list records in which the Award Amount for the Entire School Year as reported on the origination record is greater than the created sum of disbursements to date. You may also print a report to include originated records with no disbursement activity for the award year.



```
Report Date  03/14/2002   U.S. DEPARTMENT OF EDUCATION              PAGE:  1
Report Time:    12:42:28 2002-2003 FEDERAL PELL GRANT PROGRAM
                              List - Disbursements Pending
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
****************************************************************************
Reporting Campus ID     099999     Name EDE UNIVERSITY
Attended Campus ID      099999     Name EDE UNIVERSITY

STUDENT'S NAME                       AWARD    TOTAL DISBURSEMENT  REMAINING DISB
ORIGINATION ID                       AMOUNT     AMOUNT CREATED    TO BE CREATED
--------------------------------   --------  ------------------  -------------
BORTON, WENDELL J.                 $3550.00            $1775.00       $1775.00
126815096ST200309999900
```



FSA

Learn More About the Changes...

- ◆Action Letter # 2

  *URL:*

  *http://www.ifap.ed.gov/dpcletters/gen0116.html*
- ◆EDExpress Help System

3–11

## Resources

Resources are available if you need additional information about the changes to the Pell module of EDExpress for 2002–2003.

### Action Letter #2

Action Letter #2, issued in November 2001, provides information about changes and enhancements to the 2002-2003 EDEsuite software. Follow these instructions to access the letter:

- Go to **ifap.ed.gov**
- Select **Current Publications by Title**
- Select **Action Letters**

### EDExpress Help

The EDExpress Help system also has a complete listing of the changes to the software. From the main menu:

- Select **Help**
- Select **What's New for 2002–2003**
- Select **What's New in Pell?**

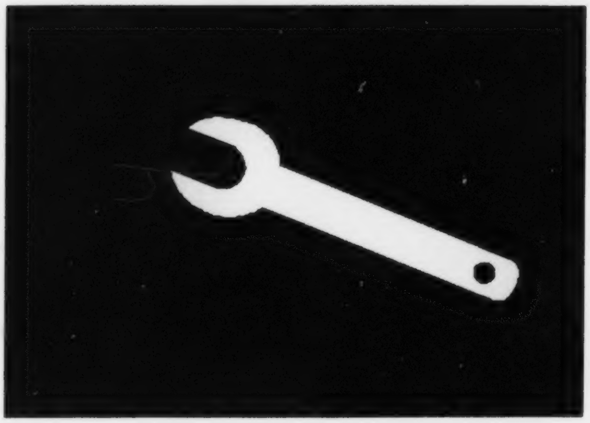
# Group Learning Activity

## Jeopardy Game

### *Instructions*

Test your knowledge about Pell EDExpress by joining everyone in a game of Jeopardy.

Have fun…And remember to provide your answer in the form of a question!



# *Setting Up EDExpress*

# Session 4—Setting Up EDExpress

FSA

## Objectives

- Learn how to set up a Pell institution reporting campus
- Learn how to set up a Pell institution for an attended campus

4–1

# Key Terms

## Attended Campus

The campus the student actually attends. If the school is a single campus school (not reporting for any branch campuses), then the reporting and attended campus IDs will be the same.

## Cost of Attendance (COA)

A dollar amount used with the EFC to determine the student's scheduled Federal Pell Grant. A student's cost of attendance includes tuition and fees; room and board expenses while attending school; and allowances for books and supplies, transportation, loan fees (if applicable), dependent care costs, costs related to a disability, and other miscellaneous expenses. In addition, reasonable costs for a study-abroad program, costs associated with a student's employment as part of a cooperative education program, and the cost for purchase or rental of a computer may be included.

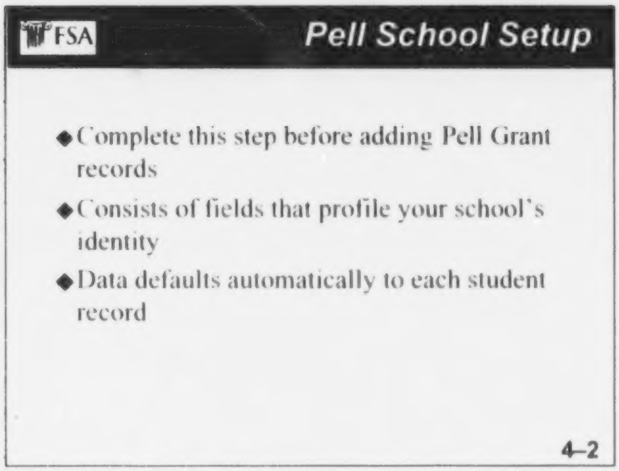
For more information about the components used to calculate a student's Pell COA, see *The Federal Student Financial Aid Handbook*.

## Pell ID

The six-digit identification number that the Federal Pell Grant Program assigns a participating campus.

## Reporting Campus

The funded school.



FSA

## Pell School Setup

- Complete this step before adding Pell Grant records
- Consists of fields that profile your school's identity
- Data defaults automatically to each student record

4-2

## Pell School Setup

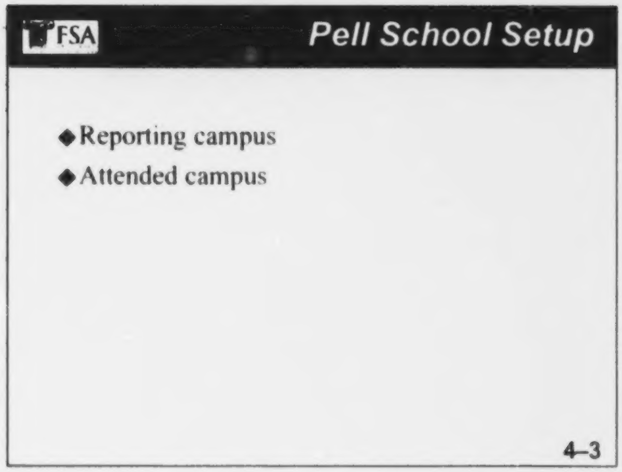
Before you can add Federal Pell Grant records, you must first enter information about your school in EDExpress. Depending on the method you use to participate in the Federal Pell Grant Program, you need to provide information about your school and any corresponding branch campuses.

Both a **reporting** and an **attended** school code identify each student's Federal Pell Grant record that you add to EDExpress. When you enter information about your school you have the option of entering default data such as cost of attendance and enrollment status. This default data is added automatically to every student record, so you do not have to enter it manually. However, if necessary, you can change default data on a student's individual record.

Access the Pell School Setup dialog box by selecting Tools, then Setup from the EDExpress main menu. Select the Pell tab, and then click the School button.

The Pell School Setup dialog box displays, consisting of fields that profile a school's identity. The first profile to be established is that of the reporting campus. A default reporting campus profile must be established before a school can enter, import, or export Pell records.

If the school is a single campus school (not reporting for any branch campuses), then the reporting and attended campus IDs will be the same. If a school is a multi-campus school (reporting for branch campuses), then reporting and attended campus IDs may be different.



FSA

**Pell School Setup**

- ◆Reporting campus
- ◆Attended campus

## Reporting Campus

The reporting campus is the Federal Pell Grant funded school. You can enter any number of reporting campus default setups and as many as ten attended campus default records for each reporting campus. The system saves these only as default values, and you can replace them as needed in the data entry screens.

You must create a default school before you can perform many of the software functions. You can enter as many as ten cost of attendance amounts for each campus.

## Attended Campus

For independent campuses, this is the same as the reporting campus. For central administrative campuses and offices reporting for branch campuses with a unique Pell institution number, the attended campus is the campus the student actually attends.

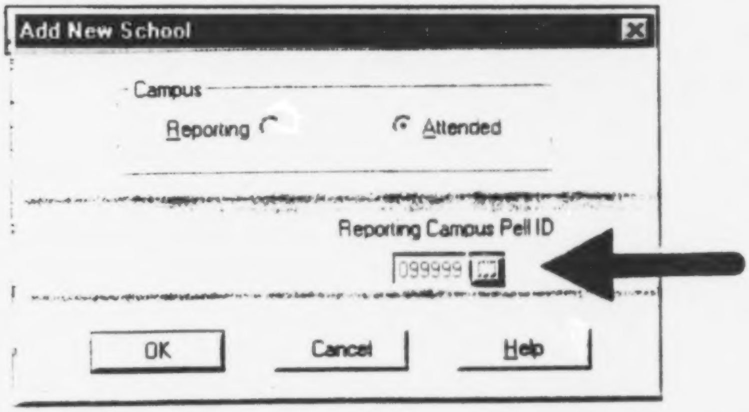
The attended campus ID must be a valid Pell institution number for a campus or location eligible to participate in the Federal Pell Grant Program, as shown on your current Program Participation Agreement for the Federal Student Financial Assistance Programs.

## Setting Up an Attended Campus: Instructor Demonstration

You first need to set up your reporting campus before adding an attended campus. EDExpress will not allow you to set up an attended campus before a reporting campus. For this demonstration, the reporting campus has already been set up for you. The instructor demonstration will go right into setting up an attended campus. The steps for setting up an attended campus are exactly the same as those for a reporting campus, except you select attended campus instead of reporting campus on the 'Add New School' dialog box. For details on how to set up a reporting campus, see the *Pell Desk Reference*, or EDExpress On-Line Help.

We will now add an attended campus to EDExpress.

| Step | Action |
|---|---|
| 1 | Select **Tools/Setup** from the menu bar. Make sure the Pell tab is highlighted. |
| 2 | Click the **School** button. The Pell School Setup dialog box displays showing the reporting campus that we have already set up for you. |
| 3 | Click **Add.** The **Add New School** dialog box appears. |
| 4 | Select **Attended** Campus. This is the campus the student actually attends. |
| 5 | Click the ellipsis (…) button to select a **Reporting Campus Pell ID**.<br>In this case, select the **099999** Reporting Campus Pell ID. The Reporting Campus Pell ID is the six-digit Pell ID for a participating independent campus or central administrative campus/office for branch campuses that has a unique Pell ID. The reporting campus is the funded school. |
| 6 | Click **OK**. The Add New School dialog box redisplays. |

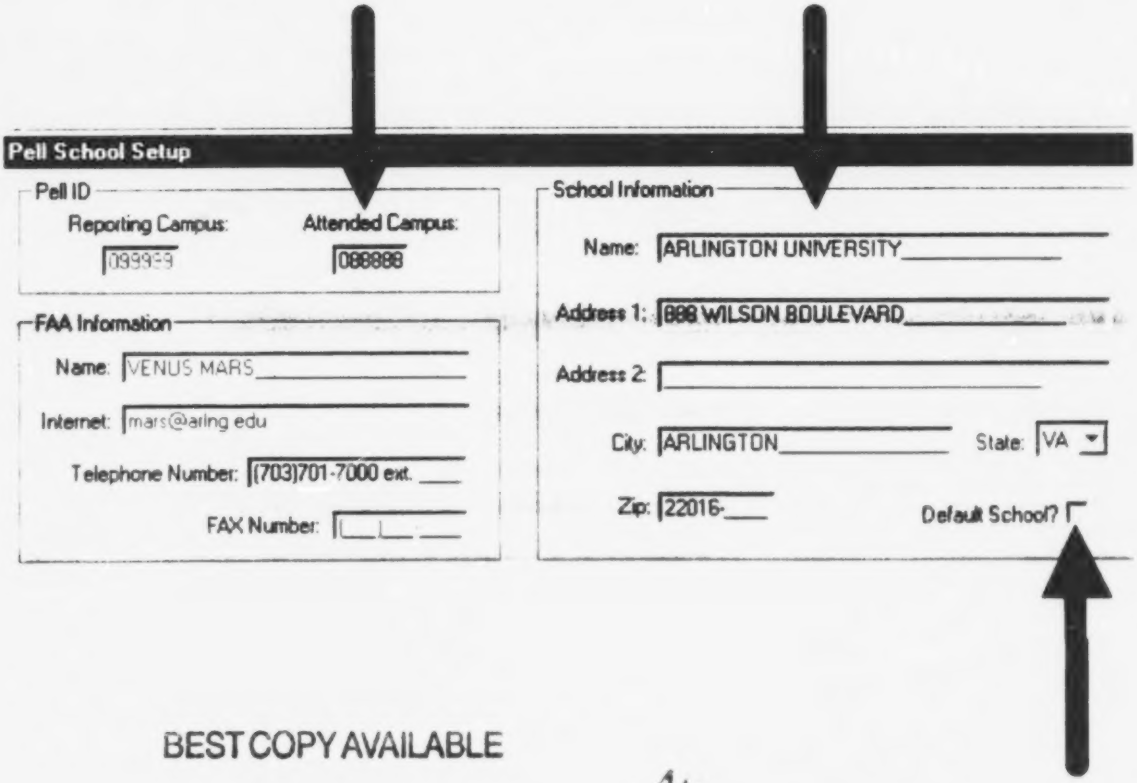


Reporting ○ ● Attended

Reporting Campus Pell ID 099999

# *Setting Up an Attended Campus: Instructor Demonstration (continued)*

| Step | Action |
|---|---|
| **7** | Click **OK** again. Pell School Setup dialog box redisplays. |
| **8** | Enter the **Attended Campus Pell ID**. In this case, enter **088888**.<br>The name and address fields for the school are automatically filled with data from the EDExpress database.<br>The Attended Campus Pell ID is the Pell identification number of the attended campus. |
| **9** | Mark the **Default School?** checkbox if you want this school to be the default Reporting School. In this case, leave the checkbox **blank**.<br>Enabling this checkbox ensures that information about this school will automatically be placed on reports, screens, and records. |



**Pell School Setup**

Pell ID

Reporting Campus: 099999

Attended Campus: 088888

FAA Information

Name: VENUS MARS

Internet: mars@arlng.edu

Telephone Number: (703)701-7000 ext.

FAX Number:

School Information

Name: ARLINGTON UNIVERSITY

Address 1: 888 WILSON BOULEVARD

Address 2:

City: ARLINGTON

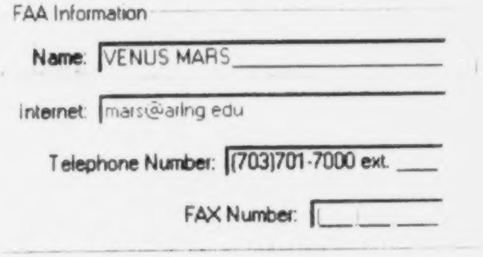
State: VA

Zip: 22016-

Default School? ☐

## Setting Up an Attended Campus: Instructor Demonstration (continued)

| Step | Action |
|---|---|
| **10** | Enter the Financial Aid Administrator's (FAA's) **Name**. In this case, enter **VENUS MARS**.<br>This is the name of the FAA officially responsible for the accuracy and completeness of all data submitted to the Federal Pell Grant Program. |
| **11** | Enter the FAA's **Internet** address. In this case, enter mars@arlng.edu.<br>This is the e-mail address of the school's authorized official. Do not provide an e-mail address that can be used only with your school's internal e-mail system. |
| **12** | Enter the FAA's **Telephone Number**. In this case, enter **703-701-7000**.<br>This is the phone number, including area code, of the FAA officially responsible for the accuracy and completeness of all data submitted to the Federal Pell Grant Program. |
| **13** | Enter the FAA's **Fax Number**. In this case, leave the Fax Number **blank**.<br>This is the fax number, including area code, of the FAA for this campus. Do not enter the number for your service agent. |



FAA Information

Name: VENUS MARS

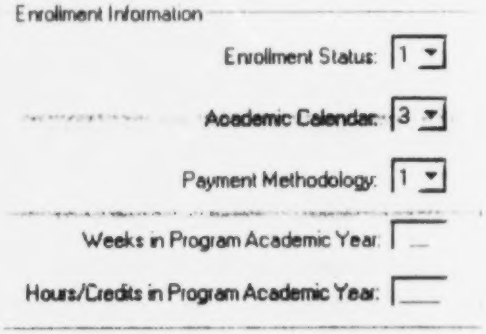
Internet: mars@arlng.edu

Telephone Number: (703)701-7000 ext.

FAX Number:

## Setting Up an Attended Campus: Instructor Demonstration (continued)

| Step | Action |
|---|---|
| 14 | Select the **Enrollment Status** for the award year. In this case, enter **1** (Full Time). This code applies to the student's expected enrollment status for the award year. Must be valid when Payment Methodologies 1, 2, 3, or 5 are used. |
| 15 | Select the **Academic Calendar**. In this case, enter **3** (Semesters). The academic calendar applies to this student's educational program. It must be valid or system accepted to process the record. |
| 16 | Select the **Payment Methodology**. In this case, enter **1** (Formula 1). The payment methodology indicates which formula a school uses to calculate student awards. The formula depends on the academic calendar selected. These are standard formulas established by the final Federal Pell Grant Program regulations. A table showing the rules governing this field is presented on the following page. |
| 17 | Enter the number of **Weeks in Program Academic Year.** In this case, leave this field **blank**. This is the number of weeks of instruction in the school's academic year. For Payment Methodologies 2, 3, 4, or 5 this field must be completed. Can be blank with Payment Methodology 1. |
| 18 | Enter the **Hours/Credits in Program Academic Year.** In this case, leave this field **blank**. Complete this field for students enrolled in a program that: 1) measures progress in clock hours; 2) measures progress in credit hours and does not have terms; or 3) has a nonresidential portion offered by correspondence and does not use terms. This field should be blank for all other academic calendars. |



Enrollment Information

Enrollment Status: 1

Academic Calendar: 3

Payment Methodology: 1

Weeks in Program Academic Year:

Hours/Credits in Program Academic Year:

EST COPY AVAILABLE

BEST COPY AVAILABLE

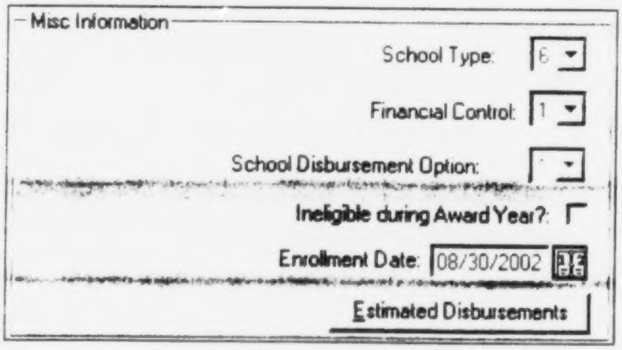
**Credits/Hours in Program's Academic Year**

**Weeks of instructional time in Program's Academic Year**

| Payment Methodology | Academic Calendar | May be used for students in a program: | | |
|---|---|---|---|---|
| 1 | 2=Quarter<br>3=Semester<br>4=Trimester | (b) That uses standard terms.<br>(c) In which the fall through spring terms:<br>(i) equal or exceed 30 weeks of instructional time, or<br>(ii) equal or exceed the weeks in its academic year if the program receives a waiver from ED. | Blank | Blank |
| 2 | 2=Quarter<br>3=Semester<br>4=Trimester | (b) That uses standard terms.<br>(c) In which the fall through spring terms:<br>(i) are less than 30 weeks of instructional time, and<br>(ii) the program did not receive a waiver of the 30-week minimum from ED. | Valid value = 30-78 | Blank |
| 3 | 1=Credit Hour<br>2=Quarter<br>3=Semester<br>4=Trimester | (a) That measures progress in credit hours.<br>(b) That uses terms (standard or nonstandard). | Valid value = 30-78 | Blank |
| 4 | 5=Clock Hour<br>6=Credit Hour without terms | (a) That measures progress in clock hours.<br>(b) That measures progress in credit hours but does not have terms. | Valid value = 30-78 | Valid values: 5 – clock hr = 900–3120.<br>6 credit hr without terms = 24 -100 |
| 5 | 1=Credit Hour<br>2=Quarter<br>3=Semester<br>4=Trimester<br>6=Credit Hour without terms | (a) That is offered by correspondence.<br>(b) That is a nonresidential portion of an eligible program.<br>(c) That measures progress in credit hours (standard terms, nonstandard terms, or without terms). | Valid value = 30-78 | Valid values: 5 – clock hr = 900–3120.<br>6 credit hr without terms = 24 -100 |

## *Setting Up an Attended Campus: Instructor Demonstration (continued)*

| Step | Action |
|---|---|
| **19** | Select the **School Type** that best describes most of your school's program. In this case, select **6** (Five years or more).<br>If your school cannot be described by the codes listed, leave this field blank. |
| **20** | Select the **Financial Control** code that best describes your school. In this case, select **1** (Public).<br>This code indicates the source of financial control for your school. |
| **21** | The **School Disbursement Option** is unavailable (grayed-out) when adding or modifying an attended campus record.<br>When adding a reporting campus, use this field to specify the option your school uses to disburse funds. |
| **22** | Check the **Ineligible During Award Year?** checkbox if your school was ineligible for federal Title IV financial aid during a portion of the award year.<br>In this case, leave this field **unchecked** indicating that your school was eligible for the entire award year.<br>This checkbox is only available for Attended Campus setup. |
| **23** | Enter the **Enrollment Date** for the date classes begin for the student's program in the 2002–2003 school year. In this case, enter **08/30/2002**. |



Misc Information

School Type: 6

Financial Control: 1

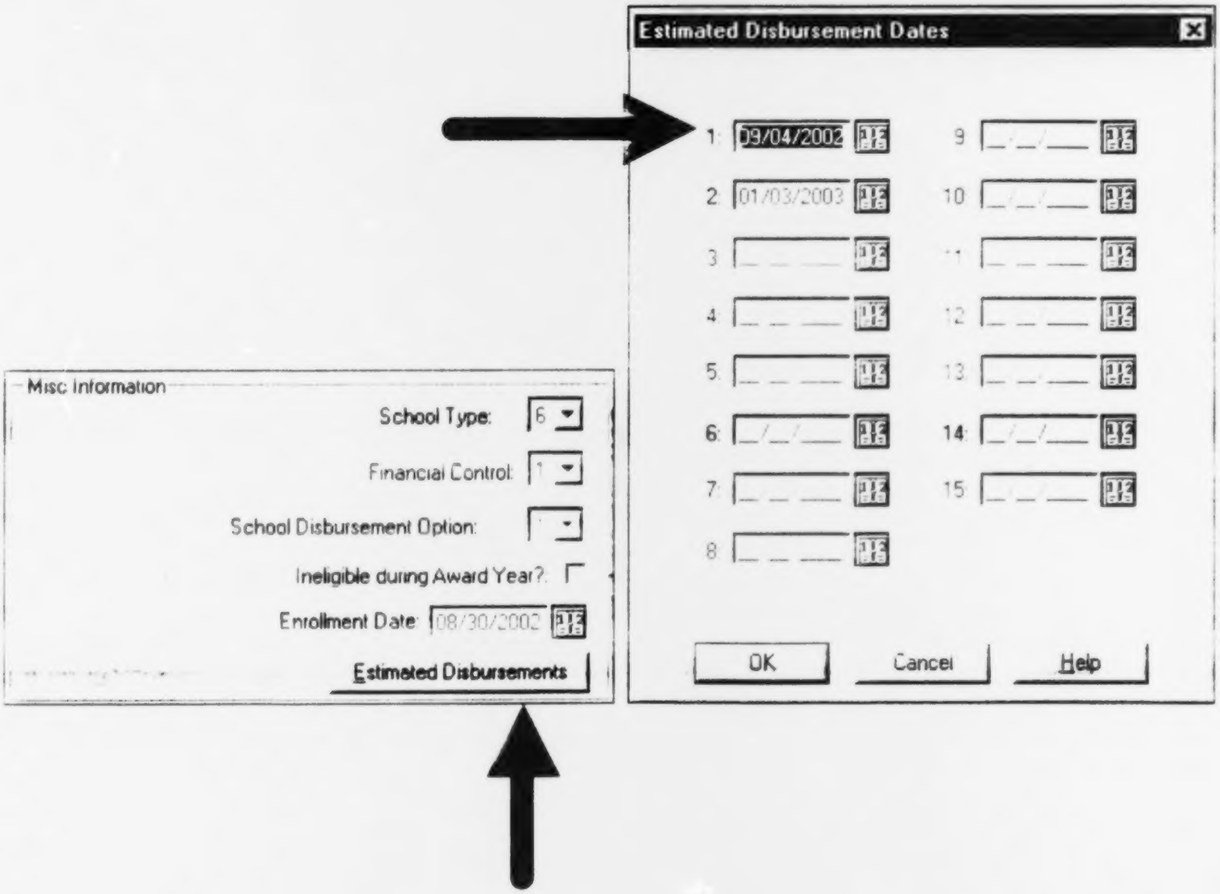
School Disbursement Option:

Ineligible during Award Year? ☐

Enrollment Date: 08/30/2002

## *Setting Up an Attended Campus: Instructor Demonstration (continued)*

| | |
|---|---|
| **24** | Click the **Estimated Disbursements** button to enter the dates you expect to make Pell Grant Payments to students.<br>In this case, enter the following two dates in the first two positions:<br>**1. 09/04/2002**<br>**2. 01/03/2003**<br>The first estimated disbursement date must be entered. You can enter up to 15 estimated disbursement dates for your school. Dates entered here become the default on the student origination entry screen. |
| **25** | Click **OK** to close the box. |



Misc Information

School Type: 6

Financial Control: 1

School Disbursement Option:

Ineligible during Award Year? ☐

Enrollment Date: 08/30/2002

Estimated Disbursement Dates

1: 09/04/2002

2: 01/03/2003

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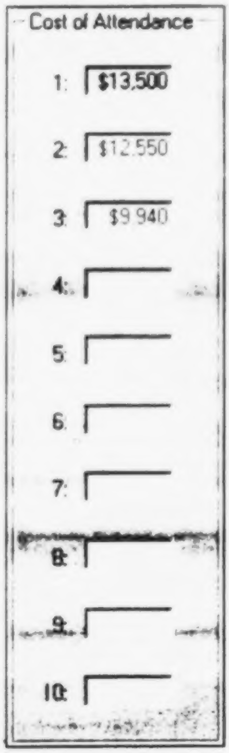
## *Setting Up an Attended Campus: Instructor Demonstration (continued)*

| Step | Action |
|---|---|
| **26** | Enter the **Cost of Attendance** (COA) figures.<br>In this case, enter the following three figures in the first three positions:<br>1. **$13500**<br>2. **$12550**<br>3. **$9940**<br>The COA is used with the EFC to determine the student's Scheduled Federal Pell Grant. Note that the first field is required. This is the field that will default automatically to all student records. For that reason, you should enter the most commonly used cost of attendance in the first field. The other COA figures will be available to you in a pick list on the Pell Grant tab screen. |



Cost of Attendance

1: $13,500

2: $12,550

3: $9,940

4:

5:

6:

7:

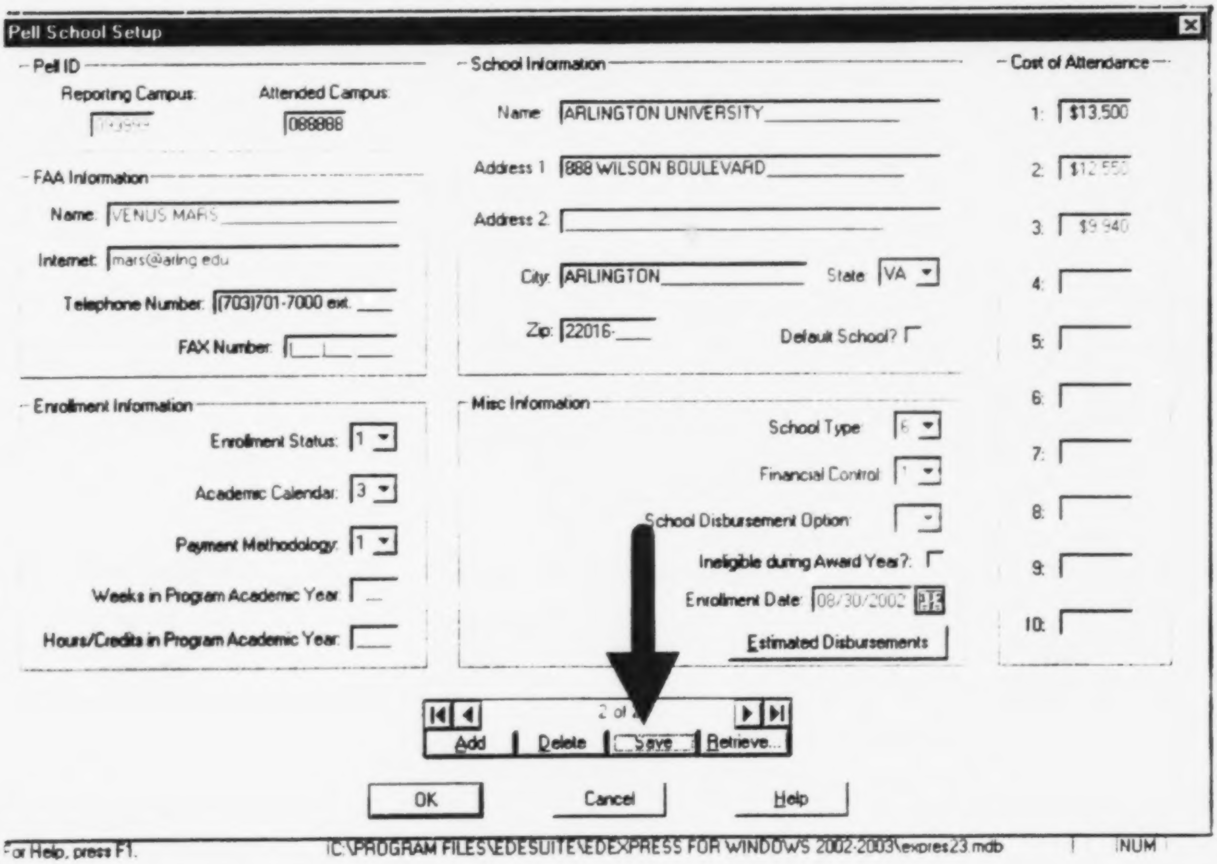
8:

9:

10:

## Setting Up an Attended Campus: Instructor Demonstration (continued)

| Step | Action |
|---|---|
| **27** | Click **Save** to save the record. |
| **28** | Click **Add** to create another record or click **OK** to close the dialog box. In this case, click **OK**. |



Pell School Setup

Pell ID
Reporting Campus: [illegible]
Attended Campus: 088888

FAA Information
Name: VENUS MARS
Internet: mars@arlng.edu
Telephone Number: (703)701-7000 ext.
FAX Number:

Enrollment Information
Enrollment Status: 1
Academic Calendar: 3
Payment Methodology: 1
Weeks in Program Academic Year:
Hours/Credits in Program Academic Year:

School Information
Name: ARLINGTON UNIVERSITY
Address 1: 888 WILSON BOULEVARD
Address 2:
City: ARLINGTON
State: VA
Zip: 22016-
Default School? ☐

Misc Information
School Type: 6
Financial Control: 1
School Disbursement Option:
Ineligible during Award Year?: ☐
Enrollment Date: 08/30/2002

Cost of Attendance
1: $13,500
2: $12,550
3: $9,940
4:
5:
6:
7:
8:
9:
10:

2 of

For Help, press F1.
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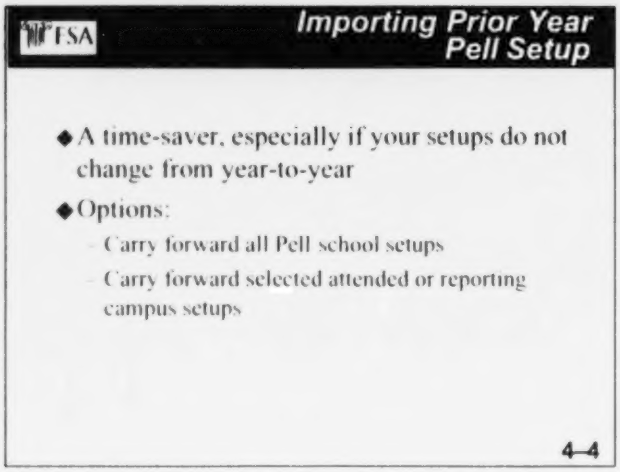


FSA

**Importing Prior Year Pell Setup**

- A time-saver, especially if your setups do not change from year-to-year
- Options:
  - Carry forward all Pell school setups
  - Carry forward selected attended or reporting campus setups

4–4

# Importing Prior Year Pell Setup

Setup data from the database of the prior year of EDExpress can be imported into the database of the new version of EDExpress. If the prior year's data has not changed, importing it saves you time, because you do not have to re-enter it.

To carry forward your prior year setups, select File/Import from the main menu. With the Global tab highlighted, select Prior Year User-Defined Queries and Setup as the import type. This import type carries forward the queries and setup definitions that you used in the prior year's version of EDExpress. Click the File button and select last year's EDExpress database. Then click the OK button.

The Prior Year Move dialog box allows you to select the queries and setup options you want to move from the prior year's EDExpress database into the current year's EDExpress database. Mark the checkboxes in the import column for the user-defined queries and setup options you want to move.

The School Default Flag will be brought forward when importing Prior Year Pell Setup information if that school is selected. You also have the option of selecting data by Attended Campus or Reporting Campus during a Prior Year Import. However, remember to update any date fields.

# Individual Learning Activity

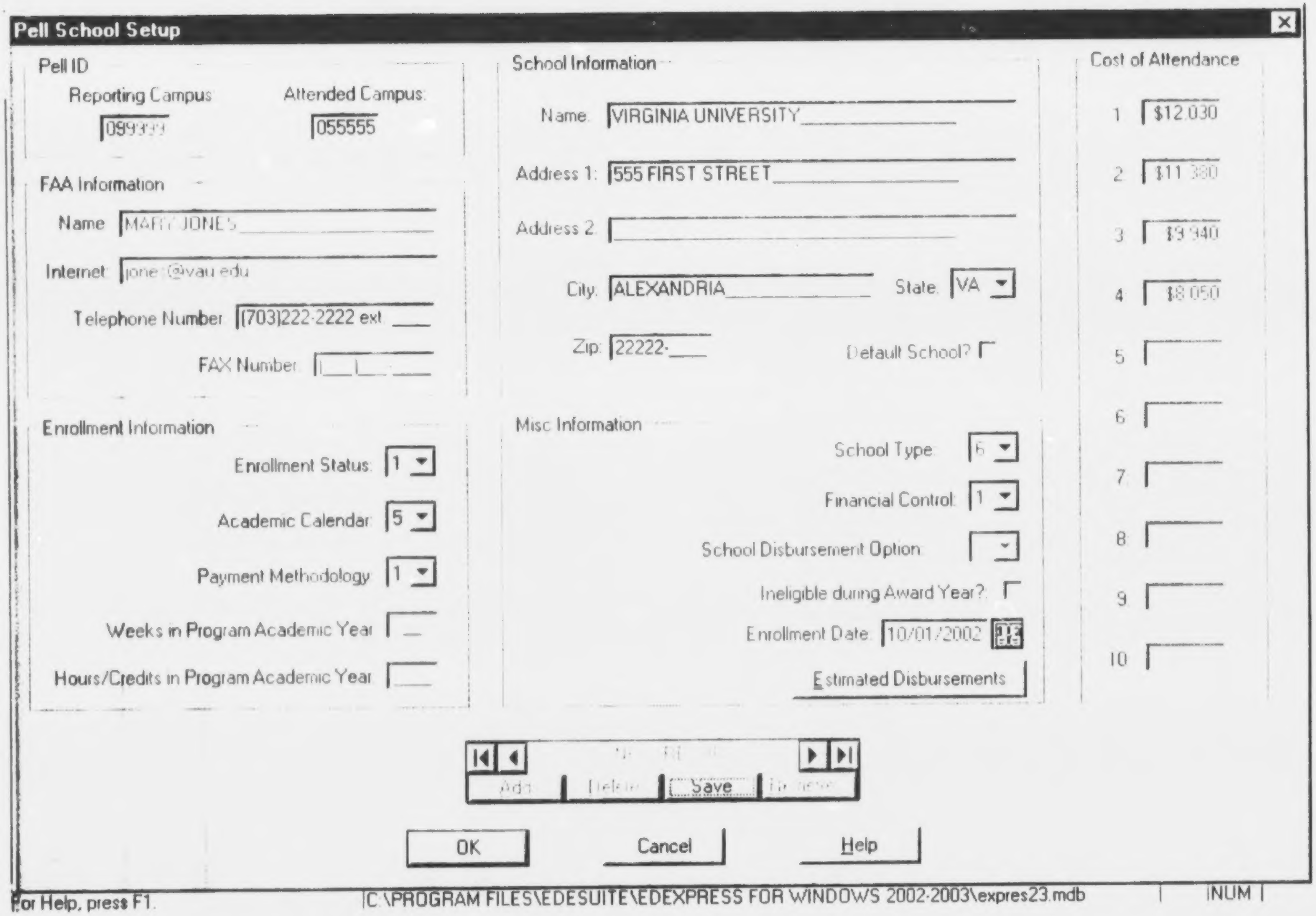
## *Instructions*

How well are you able to interpret the data on the Pell School Setup dialog box?

Screens for four schools are displayed on the following four pages.

Match the statement on the left with the school on the right by drawing a line. The first one has been completed for you.

| **Statement** | **School** |
|---|---|
| 1. This Pell school setup is for a Reporting Campus. | Virginia University |
| 2. Information about this school will not automatically be placed on reports, screens, and records. | Arlington University |
| 3. The Cost of Attendance figure of $15,080 will default to every student's record for this campus/university. | EDE University |
| 4. This school uses clock hours to measure academic progress. | Ballston Technical Institute |
| 5. Enrollment information for this school is not consistent with the Federal Pell Grant Regulations. | |
| 6. One required data element needs to be entered before this record can be saved. | |



Pell ID
Reporting Campus: 099999
Attended Campus: 055555

FAA Information
Name: MARY JONES
Internet: jones@vau.edu
Telephone Number: (703)222-2222 ext.
FAX Number: ( ) -

Enrollment Information
Enrollment Status: 1
Academic Calendar: 5
Payment Methodology: 1
Weeks in Program Academic Year:
Hours/Credits in Program Academic Year:

School Information
Name: VIRGINIA UNIVERSITY
Address 1: 555 FIRST STREET
Address 2:
City: ALEXANDRIA
State: VA
Zip: 22222-
Default School? ☐

Misc Information
School Type: 6
Financial Control: 1
School Disbursement Option:
Ineligible during Award Year? ☐
Enrollment Date: 10/01/2002

Cost of Attendance
1 $12,030
2 $11,380
3 $9,940
4 $8,050
5
6
7
8
9
10

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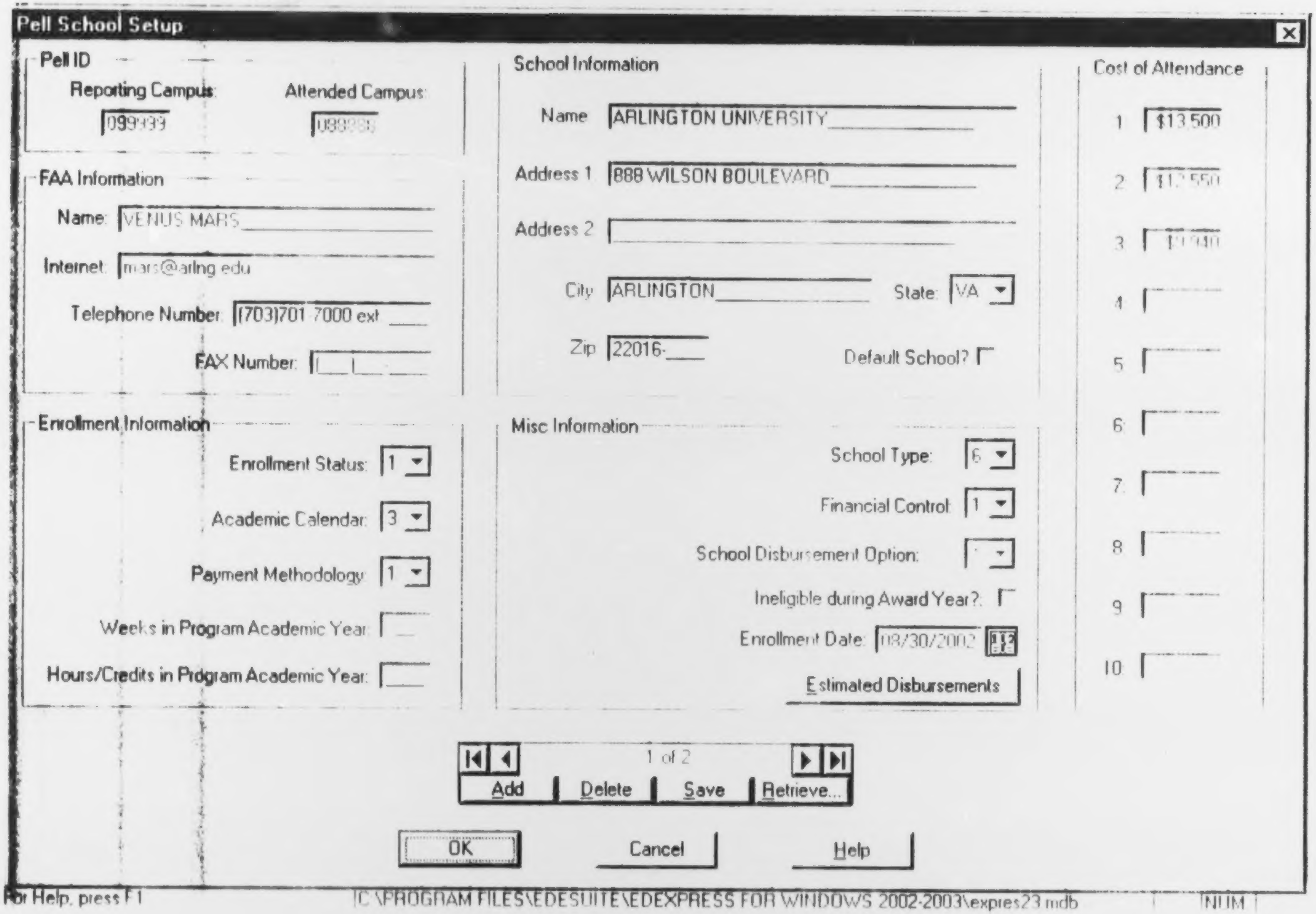

**Pell School Setup**

**Pell ID**

Reporting Campus: 099999

Attended Campus: 099999

**FAA Information**

Name: VENUS MARS

Internet: mars@arlng.edu

Telephone Number: (703)701-7000 ext

FAX Number:

**Enrollment Information**

Enrollment Status: 1

Academic Calendar: 3

Payment Methodology: 1

Weeks in Program Academic Year:

Hours/Credits in Program Academic Year:

**School Information**

Name: ARLINGTON UNIVERSITY

Address 1: 888 WILSON BOULEVARD

Address 2:

City: ARLINGTON

State: VA

Zip: 22016-

Default School? ☐

**Misc Information**

School Type: 6

Financial Control: 1

School Disbursement Option:

Ineligible during Award Year?: ☐

Enrollment Date: 08/30/2002

**Cost of Attendance**

1 $13,500

2 $12,550

3 $9,940

4

5

6

7

8

9

10

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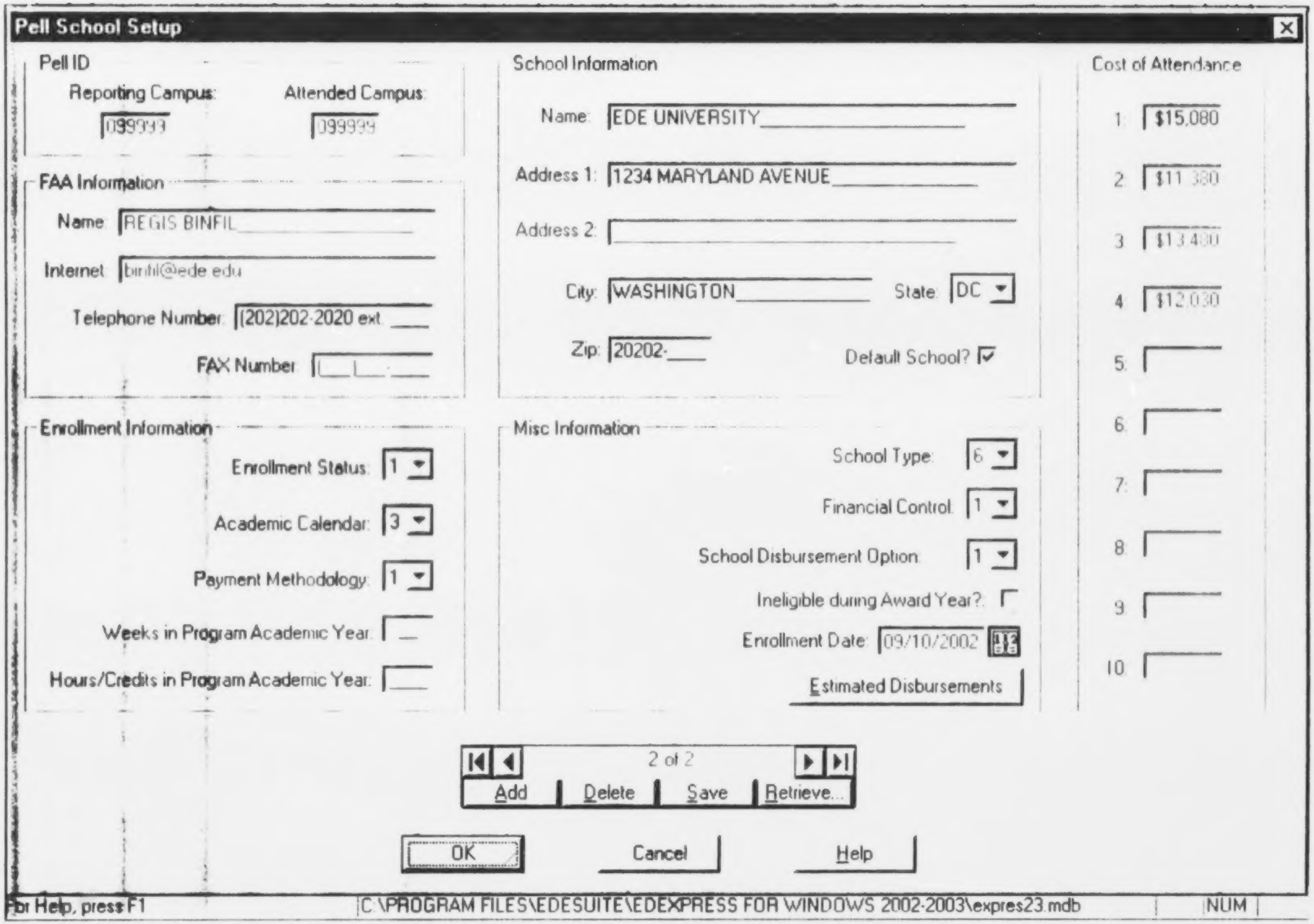

**Pell School Setup**

Pell ID
Reporting Campus: 099999
Attended Campus: 099999

FAA Information
Name: REGIS BINFIL
Internet: binfil@ede.edu
Telephone Number: (202)202-2020 ext.
FAX Number: ( ) -

Enrollment Information
Enrollment Status: 1
Academic Calendar: 3
Payment Methodology: 1
Weeks in Program Academic Year:
Hours/Credits in Program Academic Year:

School Information
Name: EDE UNIVERSITY
Address 1: 1234 MARYLAND AVENUE
Address 2:
City: WASHINGTON
State: DC
Zip: 20202-
Default School? ☑

Misc Information
School Type: 6
Financial Control: 1
School Disbursement Option: 1
Ineligible during Award Year?: ☐
Enrollment Date: 09/10/2002

Cost of Attendance
1: $15,080
2: $11,380
3: $13,400
4: $12,030
5:
6:
7:
8:
9:
10:

2 of 2

For Help, press F1
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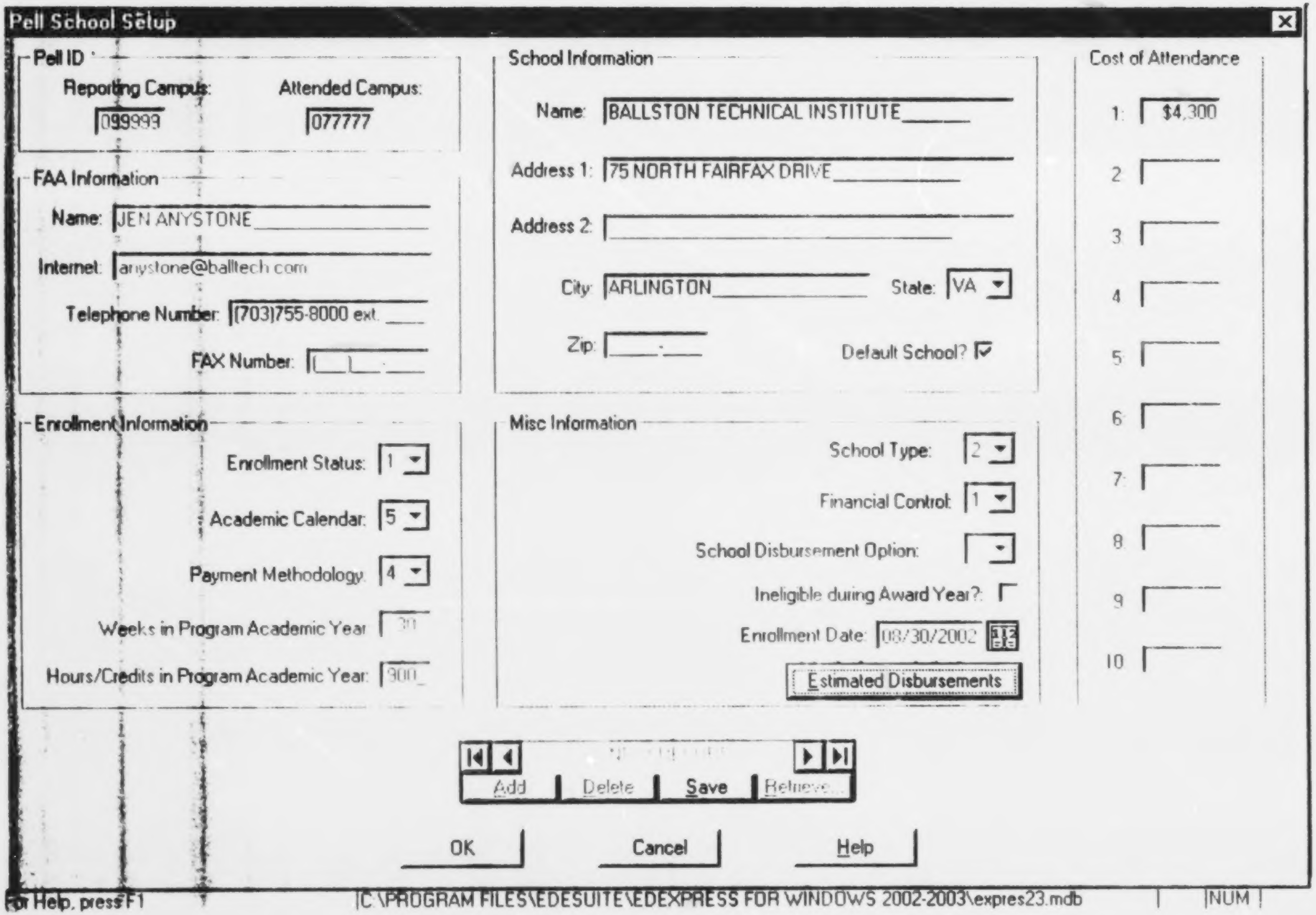

Pell School Setup

Pell ID

Reporting Campus: 099999

Attended Campus: 077777

FAA Information

Name: JEN ANYSTONE

Internet: anystone@balltech.com

Telephone Number: (703)755-8000 ext.

FAX Number: ( ) -

Enrollment Information

Enrollment Status: 1

Academic Calendar: 5

Payment Methodology: 4

Weeks in Program Academic Year: 30

Hours/Credits in Program Academic Year: 900

School Information

Name: BALLSTON TECHNICAL INSTITUTE

Address 1: 75 NORTH FAIRFAX DRIVE

Address 2:

City: ARLINGTON

State: VA

Zip: -

Default School? ☑

Misc Information

School Type: 2

Financial Control: 1

School Disbursement Option:

Ineligible during Award Year? ☐

Enrollment Date: 08/30/2002

Cost of Attendance

1: $4,300

2:

3:

4:

5:

6:

7:

8:

9:

10:

For Help, press F1

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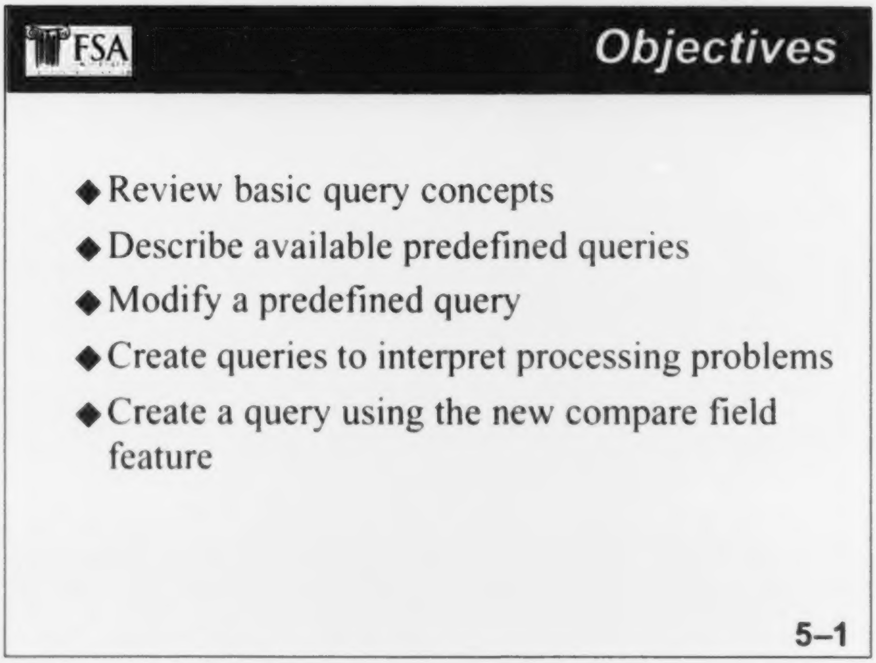
# Creating Queries

# Session 5—Creating Queries



## Objectives

- Review basic query concepts
- Describe available predefined queries
- Modify a predefined query
- Create queries to interpret processing problems
- Create a query using the new compare field feature

# Key Terms

## *And*

Used to connect two segments of a query. Both segments must be true for a record to be selected.

## *Like*

An operator that is used in a query to find values in a field that match a specified pattern, or "character string."

## *Operator*

A component of a query statement. Describes the relationship between a data field and its specified value. Operators used in EDExpress are:

| | |
|---|---|
| = | Equal to |
| > | Greater than |
| >= | Greater than or equal to |
| < | Less than |
| <= | Less than or equal to |
| <> | Not equal to |
| Like | Similar to |
| Not Like | Different from |

## *Or*

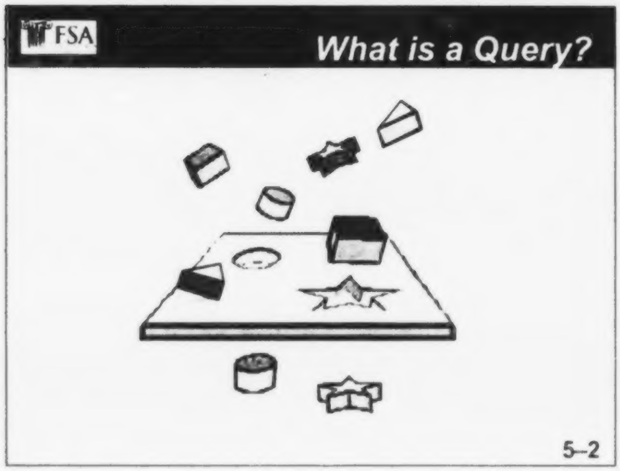
Used to connect two segments of a query. Only one of the segments must be true for a record to be selected.

## *Parameter Query*

A type of query that has fixed fields but not fixed values. When you create a parameter query, you specify the field name and operator for the query. Instead of specifying a value, you use the Prompt at Execution option. This option tells EDExpress to prompt you for the field values at the time you use the query.

## *Predefined Query*

EDExpress comes with a set of predefined queries commonly used in Global, App Express, Packaging, Direct Loan, and Pell. Use these predefined queries as they are, or modify them to suit your needs.



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What is a Query?

5–2

## What Is a Query?

A query is a request for certain records from your EDExpress database. A query describes records meeting certain criteria that you specify.

Think of a query as a lid on a box with geometric-shaped holes. Only objects that have the correct shape can be placed in the box; others do not fit. In this case the query is the lid. It has been defined to select circles and stars, and to exclude all other objects.

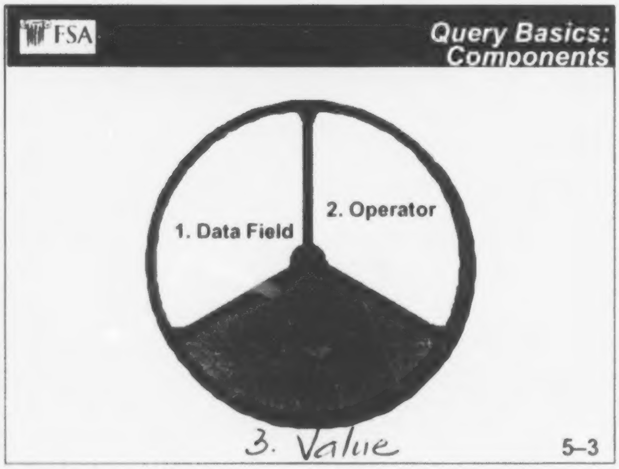
## Why Create a Query?

Use a query any time you want to work with a subset of all the records on your database. For instance, you may want to print a list of student records that were imported into EDExpress on a certain date. Or, when using the Pell module, you might need to assign a certain Pell cost of attendance to students who are state residents.

Queries are used in all modules of EDExpress to perform specific functions, such as printing and exporting. Generally, EDExpress provides the option to use a query any time working with a subset of records makes sense. Queries are available in any dialog box where you see the "Selection Criteria" button. A list of all of the functions that make use of queries within the Global, App Express, and Pell module is displayed on the following page.

# *Functions Using Queries, by EDExpress Module*

| Global | App Express | Pell |
|---|---|---|
| 1. Print Document Tracking Letters | 1. Print FAFSAs | 1. Print Pell Origination Record |
| 2. Print File Folder Labels | 2. Print ISIRs | 2. Print Edits/ Comments by Student—Origination |
| 3. Print List—Document Tracking by Document Code | 3. Print List—Entered Application Records | 3. Print Edits/ Comments by Student—Disbursement |
| 4. Print List—Document Tracking by Student | 4. Print List—Entered Correction Records | 4. Print Origination List |
| 5. Print Mailing Labels | 5. Print List—Entered Duplicate Records | 5. Print Disbursement List |
| 6. Print User Data | 6. Print List—Processed ISIRs | 6. Print List—Processed Disbursements Year-to-Date |
| 7. Print User-Defined Letters | 7. Print NSLDS | 7. Print List—Disbursements Pending |
| 8. Multiple Entry | 8. Export Applications—Initial | 8. Export External Export |
|  | 9. Export Corrections | 9. Multiple Entry |
|  | 10. Export External ISIR |  |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Query Basics: Components

5–3

## Components of a Simple Query Statement

A simple query statement has three components:

1. **Data field:** More than 750 data fields in EDExpress can be used to build a query. A list of the fields used in the App Express, Global, and Pell modules can be found in Appendix D. User-defined fields can also be used in a query. These are special fields that you create for your school's use. Unlike standard EDExpress fields that are module specific, user-defined fields are available in **all** modules for building queries.

2. **Operator:** The operator describes the relationship of the data field to a specified value. Valid operators include:

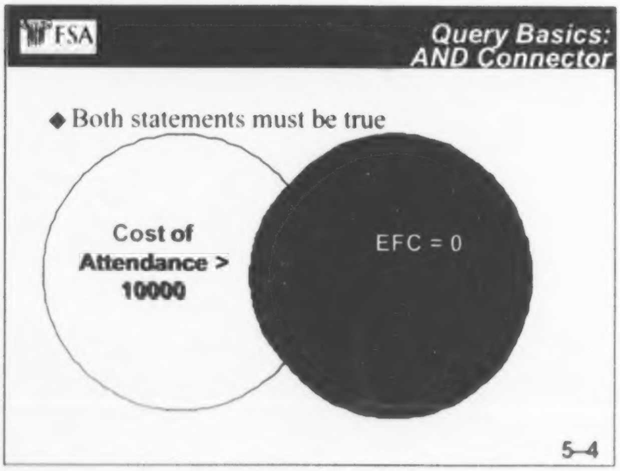
   = (equal to); > (greater than); >= (greater than or equal to); < (less than); <= (less than or equal to); <> (not equal to); Like (similar to); and Not Like (not similar to).

   Like is used for a "character string" search. You specify which characters within the field must match the criteria you provide. Whenever you use the Edits/Comments Returned By Pell field in a query, you must use the Like operator.

3. **Value:** The value specifies the criteria for selection. Use the Value Help button to obtain the range of valid values for the data field.

Here are examples of simple query statements:

| Data Field | Operator | Value |
|---|---|---|
| (SAR C FLAG—PELL | = | "Y") |
| (EFC—PELL | <= | 1000) |
| (EDITS/COMMENTS RETURNED BY PELL | LIKE | "*411*") |



FSA

## Query Basics: AND Connector

- Both statements must be true

Cost of Attendance > 10000

EFC = 0

## AND Connector

Link two or more query statements together using the AND connector.

All segments of the query connected by AND must be true for a record to be selected.

Think of two overlapping circles, each circle representing the records selected by a query statement. When the AND connector is used, the query selects only those records that represent the overlap of the two circles. For example, the following query would only select students with a cost of attendance greater than $10,000 and an EFC of 0:

(COST OF ATTENDANCE > 10000) AND (EFC—PELL = 0)

Students with a cost of attendance greater than $10,000 and with an EFC greater than 0 would not be included in the query; neither would the query select students with a zero EFC and a cost of attendance equal to or less than $10,000.

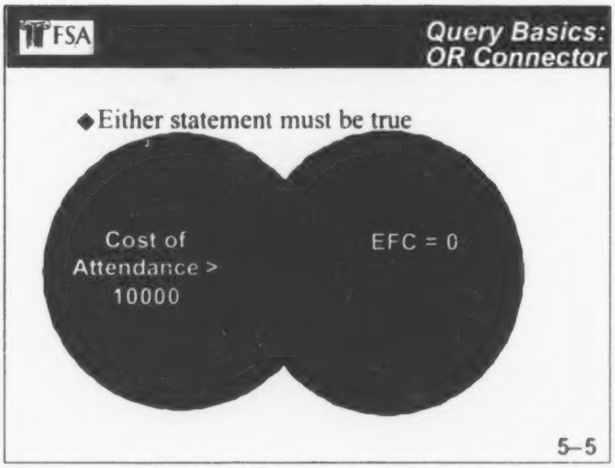
Two examples of queries using the AND connector follow:

1. (CITIZENSHIP STATUS—DEMO = "2") AND (VERIFICATION STATUS CODE—DEMO = "W")

   Identifies records for eligible non-citizens (CITIZENSHIP STATUS—DEMO = "2") for whom you have not collected the required verification documents (VERIFICATION STATUS CODE—DEMO = "W").

2. (ORIGINATION STATUS = "R") AND (PELL ORIGINATION SOURCE = "I") AND (PELL ADD DATE = "20020920")

   Identifies student records that meet all three conditions: the origination status code is R, for ready to batch, the student's origination record was created by importing ISIRs (PELL ORIGINATION SOURCE = "I"), and the student's origination record was created on September 20, 2002 (PELL ADD DATE = "20020920") Note: enter dates using the CCYYMMDD format.



FSA

**Query Basics: OR Connector**

- Either statement must be true

Cost of Attendance > 10000
EFC = 0

5–5

## OR Connector

Only one of the segments connected by OR must be true for a record to be selected.

Think again of two overlapping circles, each circle representing the records selected by a query statement. When an OR connector is used, the query selects all of the records represented by the two circles, not just records represented by the overlap of the circles. For example, the following query would select all records with a cost of attendance greater than $10,000 and all records where the EFC equals zero:

(COST OF ATTENDANCE > 10000) OR (EFC—PELL = 0)

Four more examples of queries that use the OR connector follow:

1. (DOCUMENT STATUS = "D") OR (DOCUMENT STATUS = "V")

   Identifies all records where documents have been received but not yet reviewed ("D"), as well as all records where documents are still needed for verification ("V").

2. (LOCAL STATE = "IL") OR (LOCAL STATE = "IN") OR (LOCAL STATE = "WI")

   Identifies records for students who reside in Illinois, Indiana, or Wisconsin.

3. (ENROLLMENT STATUS = "4") OR (ENROLLMENT STATUS = NULL)

   Identifies students attending less than half-time ("4") or who did not report an enrollment status (NULL)

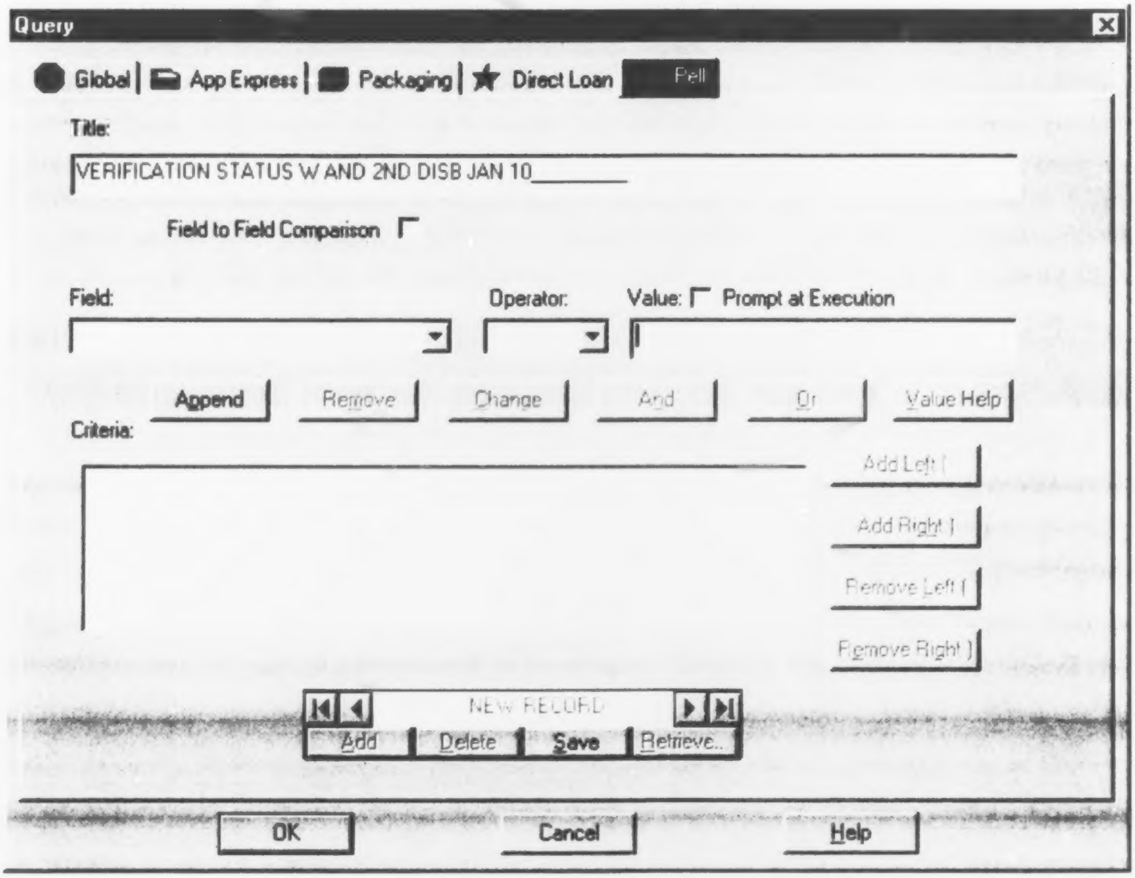
4. (LAST NAME—DEMO < "C") OR (LAST NAME—DEMO >"W")

   Selects all records with a last name beginning with A, B, X, Y, or Z.

## Creating a Query: Instructor Demonstration

In this demonstration, we build a query to select all Pell records with a Verification Status code of W (verification has not been completed) and a second disbursement date of January 10, 2003.

| Step | Action |
|---|---|
| **1** | Select **Tools/Query** from the menu bar. The Query Dialog box displays.<br>Click the Pell tab if it is not highlighted, |
| **2** | Select **Add** to build a new query. A blank page displays. |
| **3** | Enter the **Title**—something descriptive that readily identifies the query.<br>In this case, enter **VERIFICATION STATUS W AND 2ND DISB JAN 10.** |



Title: VERIFICATION STATUS W AND 2ND DISB JAN 10

Query
Global
App Express
Packaging
Direct Loan
Pell
Field to Field Comparison ☐
Field:
Operator:
Value: ☐ Prompt at Execution
Append
Remove
Change
And
Or
Value Help
Criteria:
Add Left (
Add Right )
Remove Left (
Remove Right )
NEW RECORD
Add
Delete
Save
Retrieve...
OK
Cancel
Help

## Creating a Query: Instructor Demonstration (continued)

| Step | Action |
|---|---|
| **4** | Click the **Field** down arrow to see the list of available fields in Pell. With the cursor, select the desired field.<br>In this case, select **Verification Status Code.** |
| **5** | Select the appropriate **Operator** by clicking the **down arrow** to see the full list.<br>In this case, select =. |
| **6** | Enter the **Value** to be measured against the field you selected.<br>In this case, enter **W**, for Without Documentation. |
| **7** | Click the **Append** button to add the statement to the query. The following query statement displays:<br>(VERIFICATION STATUS CODE = "W") |
| **8** | Click the **And** button to add the "And" connector to the end of the first statement. |
| **9** | Select **Estimated Disbursement Date 2** as the next field. |
| **10** | Select = as the operator. |
| **11** | Enter **20030110** as the date. |
| **12** | Click the **Append** button to add the statement to the query. The complete query statement displays:<br>(VERIFICATION STATUS CODE = "W") AND<br>(ESTIMATED DISBURSEMENT DATE 2 = "20030110") |
| **13** | Click **Save**, to save the query. |
| **14** | Click **OK**. |

## Using the Query: Instructor Demonstration

We have just created a query in the Pell module to identify records with Verification Status of W and an expected disbursement date of January 10, 2003.

Next, we will test the query by printing a list of Pell disbursement records.

| Step | Action |
|---|---|
| 1 | Select **File/Print** from the menu bar. |
| 2 | Click the **down arrow** in the Report text box and choose the type of list you want to print.<br>In this case, select **Disbursement List**. |
| 3 | Click **Screen** for the output destination. |
| 4 | Click **Selection Criteria.** |
| 5 | Click the **ellipsis** button. (The button on the right side of the dialog box with three dots: …) A list of available query displays. |
| 6 | Click on the title of the query.<br>In this case, click **VERIFICATION STATUS W AND 2ND DISB JAN 10.** |
| 7 | Click **OK**. |
| 8 | Click **OK** again to close the Selection Criteria dialog box. |
| 9 | Click **OK** to send the list to the screen.<br>In this case, a list of disbursement records displays. |
| 10 | Click **Zoom In** to magnify the list. |
| 11 | Click **Close** to exit. |

# Group Discussion

We have just created a query in the Pell module to identify records with Verification Status of W and an expected disbursement date of January 10, 2003.

1. Why might this query be useful at your school?

2. What other queries might be useful in informing you about the status of students who have not completed verification?

# Individual Learning Activity: #1

Test your knowledge about queries by answering the following true or false questions.

True or False

1. ________ Queries are available in any dialog box where you see the "Selection Criteria" button.

2. ________ **All** fields available for building a query in the App Express module are also available for building a query in the Pell module.

3. ________ **All** user-defined fields are available for building a query in the Pell module.

4. ________ The following is an example of when you would use the Like operator:

(DEPENDENCY STATUS—DEMO LIKE "I")

5. ________ The following query would select all the records of ineligible non-citizens (CITIZEN STATUS—DEMO = "3") and all the records of students attending full-time (ENROLLMENT STATUS = "1")

(CITIZEN STATUS—DEMO = "3") OR (ENROLLMENT STATUS = "1")

6. ________ The following query would only select the records of full-time, ineligible non-citizens.

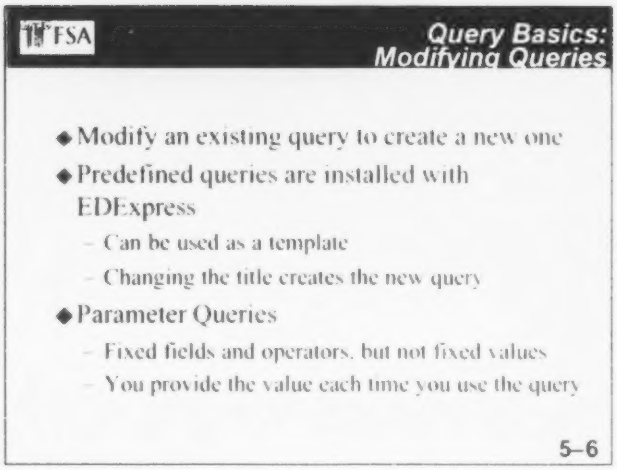
(CITIZEN STATUS—DEMO = "3") AND (ENROLLMENT STATUS = "1")

# Individual Learning Activity: #2

Review the following database of seven Pell records and enter the record numbers of the records that would be selected for each query. The first one has been completed for you.

| Record Number | Last Name | First Name | Edits/ Comments Returned By Pell | EFC | Accepted Disbursement Amount |
|---|---|---|---|---|---|
| 1 | Bird | Jason | 323 | | |
| 2 | Delph | Jane | | 702 | 1625 |
| 3 | Hart | Fred | 331 | | |
| 4 | Justin | Frank | | 0 | 2000 |
| 5 | Spark | Sue | | 1194 | 1425 |
| 6 | Jay | John | 426 | | |
| 7 | Sanchez | Jose | | 0 | 2000 |

| Query | Enter Record Number(s) Here: |
|---|---|
| (EFC >= 0) | *2, 4, 5, 7* |
| (EDITS/COMMENTS RETURNED BY PELL LIKE "*331*") | |
| (LAST NAME < "J") | |
| (EFC = 2000000002) | |
| (ACCEPTED DISBURSEMENT AMOUNT <= 1625) | |
| (FIRST NAME LIKE "RE") | |



FSA

**Query Basics: Modifying Queries**

- Modify an existing query to create a new one
- Predefined queries are installed with EDExpress
  - Can be used as a template
  - Changing the title creates the new query
- Parameter Queries
  - Fixed fields and operators, but not fixed values
  - You provide the value each time you use the query

5–6

## Modifying a Query

You can retrieve existing queries and modify them to suit your needs. Identify the query you want to change, retrieve it, and then modify the statements by changing the data field, operator, value or connector. You can also append additional statements to the existing query, or delete statements. Change the title before saving the modified query if you do not want to overwrite the original query.

## Predefined Queries

EDExpress comes with a set of predefined queries commonly used in Global, App Express, Packaging, Direct Loan, and Pell. You can also use predefined queries as templates to create your own queries.

Modify the predefined query by first changing the title. You can modify and save a predefined query only if you rename it. The system prompts you for a new title if you try to save changes to a predefined query without changing its title. Only existing user-defined queries can be modified without changing the titles.

After you change the title, change the data field, operator, or value of each statement in the query. You can also add or delete statements. When you open the Query dialog box for the first time, you see that the predefined queries are stored as the first set of records in the Query database. You know a query is predefined if you see "PREDEFINED QUERY" in the upper right corner of the Query dialog box.

A list of the predefined queries that come with EDExpress App Express, Global, and Pell modules are displayed on the following two pages.

## Parameter Query

A parameter query has fixed fields and operators, but not fixed values. When you create a parameter query, you specify the field name and operator for the query. Instead of specifying a value, you use the Prompt at Execution option. This option tells EDExpress to prompt you for the field values at the time you use the query.

## *App Express Predefined Queries*

| Title | Predefined Query |
|---|---|
| ACCEPTED RECORDS | (REJECT REASON CODES = ". . . . . . .") |
| ADD DATE RANGE | (ADD DATE - ISIR >= "[PARAMETER]") AND<br>(ADD DATE - ISIR <= "[PARAMETER]") |
| BATCH NUMBER | (BATCH ID = "[PARAMETER]") |
| C CODE | (SAR C FLAG = "[PARAMETER]") |
| COLLEGE GRADE LEVEL | (GRADE LEVEL IN COLLEGE = "[PARAMETER]") |
| CURRENT SSN | (STUDENT'S CURRENT SSN = "[PARAMETER]") |
| DEPENDENCY STATUS | (DEPENDENCY STATUS = "[PARAMETER]") |
| EARLY ANALYSIS | (EARLY ANALYSIS FLAG = "[PARAMETER]") |
| EFC RANGE | (EFC >= [PARAMETER]) AND<br>(EFC <= [PARAMETER]) |
| ENROLLMENT STATUS BLANK | (ENROLLMENT STATUSES = "....") |
| ENROLLMENT STATUS NOT BLANK | (ENROLLMENT STATUSES <> "....") |
| GRADUATE STUDENTS | ((GRADE LEVEL IN COLLEGE = "6") OR<br>(GRADE LEVEL IN COLLEGE = "7")) |
| HOUSING CODES ALL BLANK | (HOUSING PLANS 1-6 = ".....") |
| HOUSING CODES NOT BLANK | (HOUSING PLANS 1-6 <> ".....") |
| ISIRS WITH COMMENTS | (COMMENT CODES <> "000,000,000,000,000,000,000,000,000,000,000,000,000,000,000,") |
| ISIRS WITHOUT COMMENTS | (COMMENT CODES = "000,000,000,000,000,000,000,000,000,000,000,000,000,000,000,") |
| LAST NAME RANGE | (LAST NAME >= "[PARAMETER]") AND<br>(LAST NAME <= "[PARAMETER]") |
| NOT SELECTED FOR VERIFICATION | (SELECTED FOR VERIFICATION = "N") |
| REJECTED RECORDS WITH A SPECIFIC REJECT CODE | (REJECT REASON CODES LIKE "*[PARAMETER]*") |
| REJECTED RECORDS WITH ANY REJECT CODES | (REJECT REASON CODES <> ", . . . . . .") |
| SCHOOL CODE | (FEDERAL SCHOOL CODES 1-6 LIKE "*[PARAMETER]*") |
| SCHOOL CODE 1 | (FEDERAL SCHOOL CODE 1 = "[PARAMETER]") |
| SCHOOL CODE 2 | (FEDERAL SCHOOL CODE 2 = "[PARAMETER]") |
| SCHOOL CODE 3 | (FEDERAL SCHOOL CODE 3 = "[PARAMETER]") |
| SCHOOL CODE 4 | (FEDERAL SCHOOL CODE 4 = "[PARAMETER]") |
| SCHOOL CODE 5 | (FEDERAL SCHOOL CODE 5 = "[PARAMETER]") |
| SCHOOL CODE 6 | (FEDERAL SCHOOL CODE 6 = "[PARAMETER]") |
| SCHOOL CODES ALL BLANK | (FEDERAL SCHOOL CODES 1-6 = ".....") |
| SCHOOL CODES NOT BLANK | (FEDERAL SCHOOL CODES 1-6 <> ".....") |
| SELECTED FOR VERIFICATION | (SELECTED FOR VERIFICATION = "Y") |
| SSN RANGE | (STUDENT'S CURRENT SSN >= "[PARAMETER]") AND<br>(STUDENT'S CURRENT SSN <= "[PARAMETER]") |
| TRANSACTION TYPE | (ISIR TRANSACTION TYPE = "[PARAMETER]") |
| ZIP CODE RANGE | (PERMANENT ZIP CODE >= "[PARAMETER]") AND<br>(PERMANENT ZIP CODE <= "[PARAMETER]") |

## Global Predefined Queries

| Title | Predefined Query |
|---|---|
| ADD DATE RANGE | (ADD DATE >= "[PARAMETER]") AND<br>(ADD DATE <= "[PARAMETER]") |
| CURRENT SSN | (CURRENT SSN = "[PARAMETER]") |
| DEPENDENCY STATUS | (DEPENDENCY STATUS - DEMO = "[PARAMETER]") |
| LAST NAME RANGE | (LAST NAME - DEMO >= "[PARAMETER]") AND<br>(LAST NAME - DEMO <= "[PARAMETER]") |
| ORIGINAL SSN | (ORIGINAL SSN - DEMO = "[PARAMETER]") |
| SSN RANGE | (ORIGINAL SSN - DEMO >= "[PARAMETER]") AND<br>(ORIGINAL SSN - DEMO <= "[PARAMETER]") |
| STUDENTS EMAIL ADDRESS BLANK | (EMAIL ADDRESS = NULL) |
| ZIP CODE RANGE | (PERMANENT ZIP CODE - DEMO >="[PARAMETER]")<br>AND (PERMANENT ZIP CODE - DEMO<="[PARAMETER]") |

## Pell Predefined Queries

| Title | Predefined Query |
|---|---|
| ATTENDED CAMPUS PELL ID | (ATTENDING CAMPUS ID = "[PARAMETER]") |
| C CODE | (SAR C FLAG—PELL = "[PARAMETER]") |
| CURRENT SSN | (CURRENT SSN = "[PARAMETER]") |
| DEPENDENCY STATUS | (DEPENDENCY STATUS - DEMO = "[PARAMETER]") |
| DISBURSEMENT BATCH NUMBER | (DISBURSEMENT BATCH ID = "[PARAMETER]") |
| DISBURSEMENT STATUS | (DISBURSEMENT STATUS = "[PARAMETER]") |
| DISBURSEMENTS WITH COMMENTS | (DISBURSEMENT COMMENTS= NULL) |
| DISBURSEMENTS WITHOUT COMMENTS | (DISBURSEMENT COMMENTS<> NULL) |
| EDIT COMMENTS NOT BLANK | (EDITS/COMMENTS RETURNED BY PELL <> NULL) |
| EDITS COMMENTS ALL BLANK | (EDITS/COMMENTS RETURNED BY PELL = NULL) |
| EFC RANGE | (EFC—PELL >= [PARAMETER]) AND<br>(EFC—PELL <= [PARAMETER]) |
| LAST NAME RANGE | (LAST NAME—DEMO >= "[PARAMETER]") AND<br>(LAST NAME—DEMO <= "[PARAMETER]") |
| ORIGINAL SSN | (ORIGINAL SSN—DEMO = "[PARAMETER]") |
| ORIGINATION BATCH NUMBER | (ORIGINATION BATCH ID = "[PARAMETER]") |
| ORIGINATION CROSS REFERENCE | (ORIGINATION CROSS REFERENCE = "[PARAMETER]") |
| ORIGINATION STATUS | (ORIGINATION STATUS = "[PARAMETER]") |
| PAYMENT METHODOLOGY | (PAYMENT METHODOLOGY = "[PARAMETER]") |
| PAYMENT PERIODS | (NUMBER OF PAYMENT PERIODS IN STUDENT'S SCHOOL YEAR = "[PARAMETER]") |
| REPORTING CAMPUS PELL ID | (REPORTING CAMPUS ID = "[PARAMETER]") |
| PELL PROCESSOR DISBURSEMENT STATUS | (ACTION STATUS—PELL DISBURSEMENT = "[PARAMETER]") |
| PELL PROCESSOR ORIGINATION STATUS | (ACTION STATUS—ORIGINATION = "[PARAMETER]") |
| REPORTING CAMPUS PELL ID | (REPORTING CAMPUS ID = "[PARAMETER]") |
| SSN RANGE | (CURRENT SSN >= "[PARAMETER]") AND<br>(CURRENT SSN <= "[PARAMETER]") |
| STUDENTS EMAIL ADDRESS BLANK | (E-MAIL ADDRESS = NULL) |
| VERIFICATION STATUS CODE | (VERIFICATION STATUS CODE = "[PARAMETER]") |

# Individual Learning Activity: #3

## Scenario

When you get to work this morning, you read an email from your supervisor informing you that you have been assigned to enter the amount of the first disbursement for all 3,650 Pell Grant recipients at your school.

One option for accomplishing the task would be to manually enter the amount on each individual record, a difficult and lengthy task considering the number of records that need to be updated. Instead, you choose to create a query that will allow you to update the disbursement amount all at once for selected groups of students.

## Instructions

Build a parameter query in the Pell module to identify students within a certain EFC range and with a certain enrollment status. Use **Pell** as both your User ID and Password to enter the software.

Hints:

- Begin by modifying a pre-defined query
- If you need help modifying the query, use the Help system provided by EDExpress:
    1. Select Help from the main menu.
    2. Select "How Do I?"
    3. Click "Query."
    4. Click "Modify a Query."

## Discussion

1. What pre-defined query did you select to modify?

   ______________________________________________

2. How would you use this query to help you update the disbursement amount?

   ______________________________________________

   ______________________________________________

   ______________________________________________

# Individual Learning Activity: #4

## Scenario

Your boss stops by your desk and asks you to tell him how many students in your Pell database may also be enrolled and receiving Pell Grants at another school.

## Instructions

Build a query in the Pell module to identify students who are in a potential Concurrent Enrollment situation.

Hint

- Study the list of fields in Appendix D that are available to create a query in the Pell module.
- If necessary, also use the list of comment codes found in Appendix C.

## Discussion

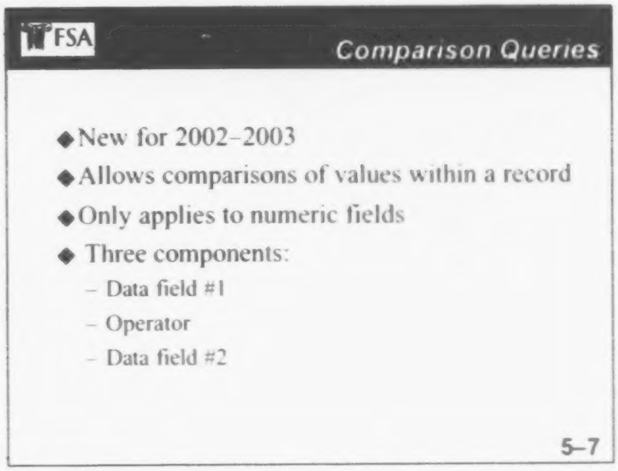
1. What query statement did you create to select records with Concurrent Enrollment?

2. What other query (s) could you have developed to select records with Concurrent Enrollment?

3. What other queries might be useful in informing you about processing issues or problems?

4. What exactly is "Concurrent Enrollment"?

5. Does the system prevent you from disbursing a Pell Grant to a student with "Concurrent Enrollment"?



FSA

Comparison Queries

- ◆ New for 2002–2003
- ◆ Allows comparisons of values within a record
- ◆ Only applies to numeric fields
- ◆ Three components:
  - – Data field #1
  - – Operator
  - – Data field #2

5–7

## Comparison Queries

Beginning in 2002–2003, EDExpress allows you to build a query that compares numeric fields within a record.

Standard queries compare the value of a data field with the value that you specify. As we have learned, they have three components:

- Data field
- Operator
- Value

Comparison queries, on the other hand, compare the value of one data field against another. Comparison queries have these three components:

- Data field #1
- Operator
- Data field #2

For example, you might want to identify dependent student records where the student's income contribution is greater than the parent's income contribution, when determining the total expected family contribution. You would create this query:

SIC: DEPENDENT STUDENT'S INCOME CONTRIBUTION > PC: PARENT'S CONTRIBUTION

Here are four other examples of comparison queries:

PARENT'S ADJUSTED GROSS INCOME = FATHER'S INCOME EARNED FROM WORK

NW: EFC NET WORTH < PARENT'S INVESTMENT NET WORTH

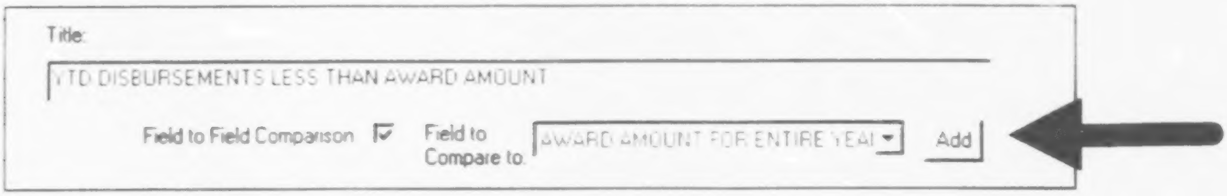
FATHER'S INCOME EARNED FROM WORK = MOTHER'S INCOME EARNED FROM WORK

PELL PROCESSOR YTD TOTAL = AWARD AMOUNT FOR ENTIRE YEAR

## Creating a Comparison Query: Instructor Demonstration

We want to identify student records where there is a pending disbursement. One way of identifying these records would be to create a query to select records where the sum of disbursement amounts that have been accepted by the Pell processor is less than the Award Amount for the Entire Year. In this demonstration, we show you how to create this comparison query.

| Step | Action |
|---|---|
| 1 | Select **Tools/Query** from the menu bar. The Query Dialog box displays.<br>Click the Pell tab if it is not highlighted. |
| 2 | Select **Add** to build a new query. A blank page displays. |
| 3 | Enter the **Title**—something descriptive that readily identifies the query.<br>In this case, enter **YTD DISBURSEMENTS LESS THAN AWARD AMOUNT.** |
| 4 | Mark the box titled **Field to Field Comparison.**<br>A drop down selection box displays titled "Field to compare to." |
| 5 | Click the **Field to compare to** down arrow to see the list of available fields. With the cursor, select **Award Amount for Entire Year**. |
| 6 | Click the **Add** button to the right of the Field To Compare box. |

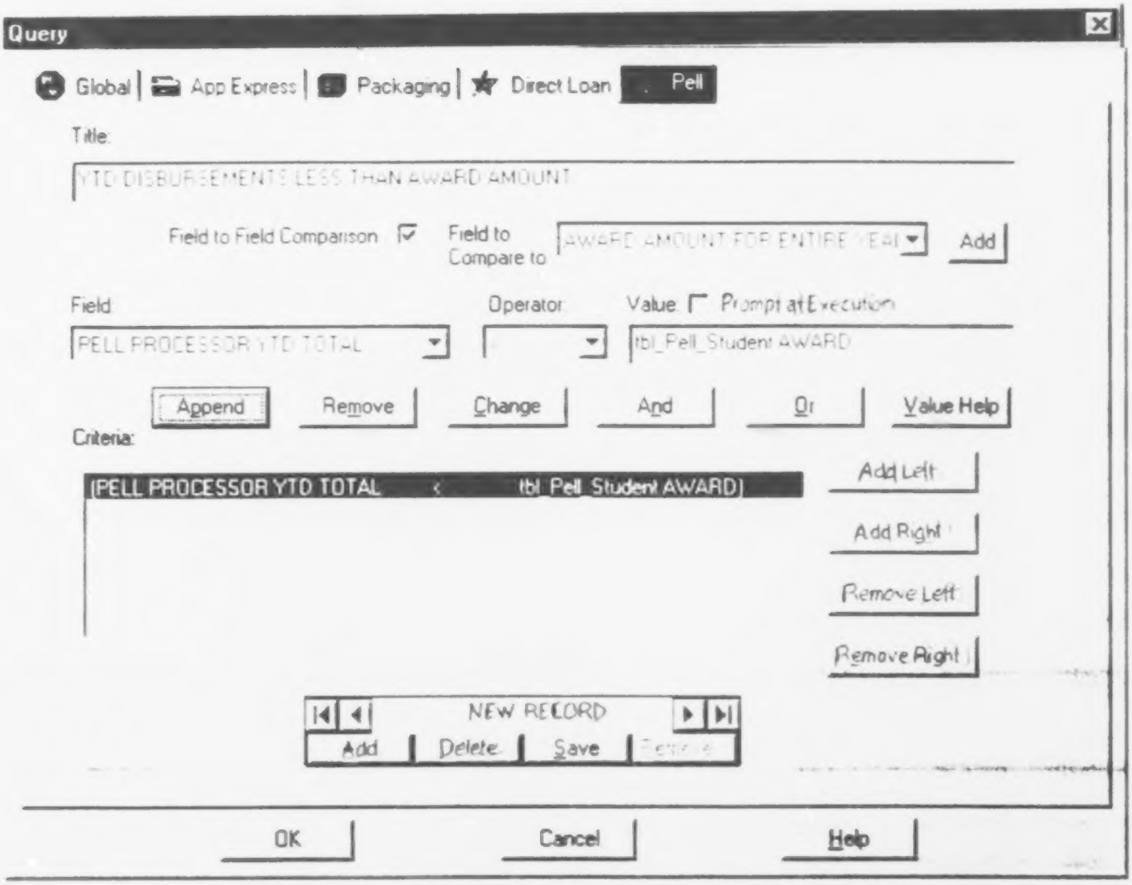


Title: YTD DISBURSEMENTS LESS THAN AWARD AMOUNT

Field to Field Comparison ☑ Field to Compare to: AWARD AMOUNT FOR ENTIRE YEA

## Creating a Comparison Query: Instructor Demonstration (continued)

| Step | Action |
|---|---|
| **7** | The technical name for the selected field displays in the value field. In this case, tbl_Pell_Student.AWARD appears.<br>Click the **Field** down arrow to see the list of available fields to compare against the Scheduled Federal Pell Grant. With the cursor, select **Pell Processor YTD Total.** |
| **8** | Select the appropriate **Operator** by clicking the **down arrow** to see the full list. In this case, select < (less than). |
| **9** | Click the **Append** button. The Query statement displays below. |
| **10** | Click **Save**. Then, click **OK** to exit the Query dialogue box. |


Query
Global
App Express
Packaging
Direct Loan
Pell
Add
Append
Remove
Change
And
Or
Value Help
Add Left
Add Right
Remove Left
Remove Right
NEW RECORD
Add
Delete
Save
Retrieve
OK
Cancel
Help

Title: YTD DISBURSEMENTS LESS THAN AWARD AMOUNT

Field to Field Comparison ☑ Field to Compare to: AWARD AMOUNT FOR ENTIRE YEA

Field: PELL PROCESSOR YTD TOTAL

Operator:

Value: ☐ Prompt at Execution

tbl_Pell_Student.AWARD

Criteria:

(PELL PROCESSOR YTD TOTAL < tbl_Pell_Student.AWARD)

# Individual Learning Activity: #5

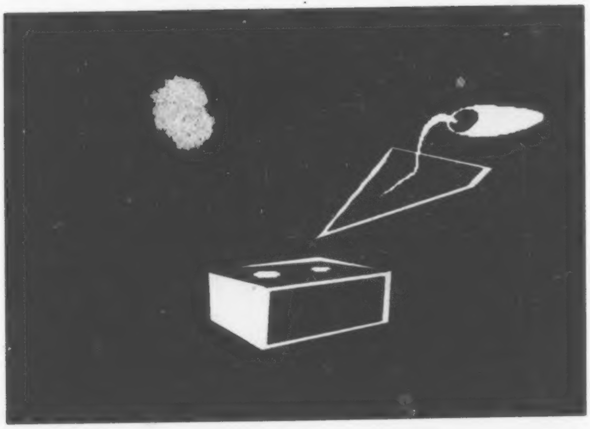
## Instructions

Build a comparison query of your own choosing that would be useful at your school. You are free to use either the Pell, App Express, or Global modules.

## Discussion

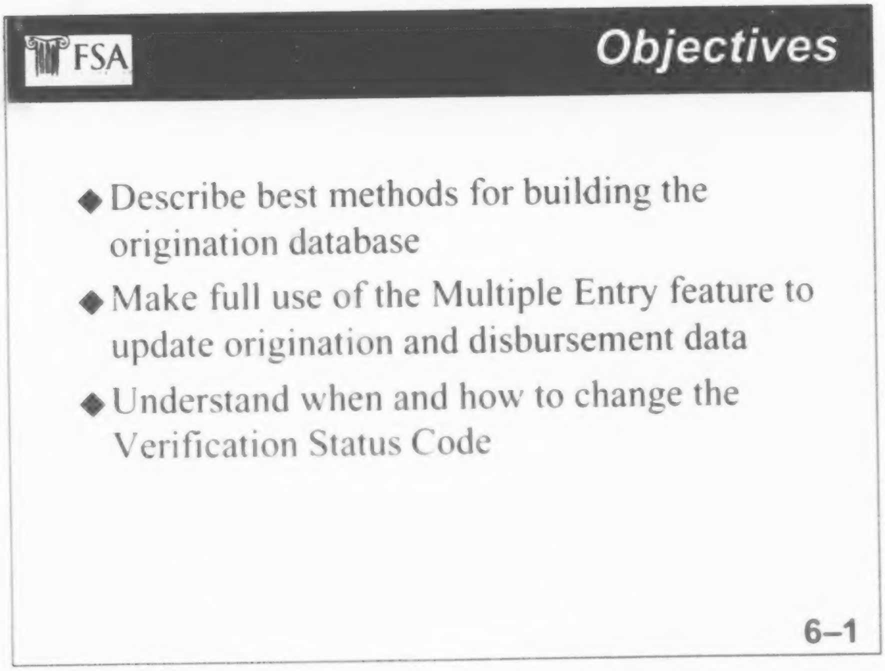
1. What query statement did you create?

2. How would you use this query in your day-to-day operations at your school?



# *Techniques to Build & Update Your Database*

# Session 6—Techniques to Build and Update Your Database



FSA

## Objectives

- ◆ Describe best methods for building the origination database
- ◆ Make full use of the Multiple Entry feature to update origination and disbursement data
- ◆ Understand when and how to change the Verification Status Code

# Key Terms

## Active Transaction

The active transaction is the transaction you're working with; the one you've paid on. Note: you may have transactions for a student after the active transaction. Make the current transaction the active transaction by opening the student's record to the SAR/ISIR Review tab and selecting Process/Activate Transaction.

## Award Amount for Entire School Year

Formerly Origination Award Amount for Entire School Year, this is the amount of the Pell Grant award for the student's entire school year. This amount must be entered on the Pell Grant tab before an origination record is created.

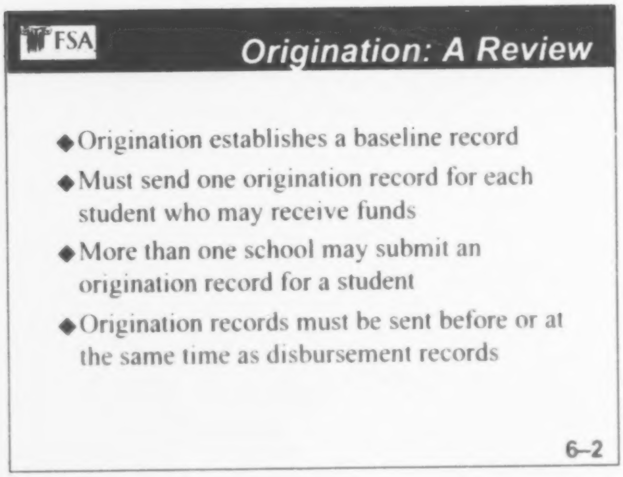
## Origination

The process of establishing a record with the Pell processor for each potential Federal Pell Grant recipient at your school. The school needs to send one origination record for each student who will receive a disbursement. The origination record contains information about the anticipated amount and dates of your Pell Grant disbursements.

## Verification Status Code

A code on the student's origination record that best describes the method under which you made payment to the student, as described in the *Verification Handbook*. The new codes for 2002–2003 follow:

- W - Without documentation
- V - Verified
- Blank - Not selected by CPS or not required to be verified



FSA

Origination: A Review

- Origination establishes a baseline record
- Must send one origination record for each student who may receive funds
- More than one school may submit an origination record for a student
- Origination records must be sent before or at the same time as disbursement records

6–2

## Origination: A Review

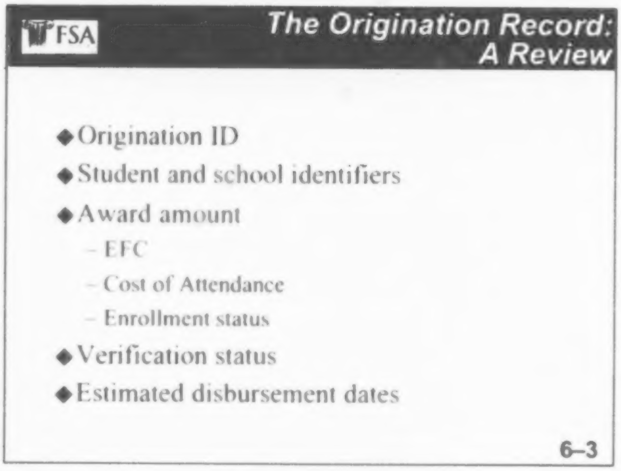
Origination establishes a record with the Pell processor for each potential Federal Pell Grant recipient at your school. Send one origination record for each student who will receive a disbursement.

The student does not have to be enrolled at your school at the time you send an origination record. In fact, you can send origination records to the Pell processor before the award year begins. The only requirements are that you have received a valid Federal Pell Grant eligible ISIR or SAR and you have calculated a Federal Pell Grant award.

No consequences result if you send an origination record for a student who does not eventually receive a Federal Pell Grant at your school. You do not need to send a corrected record or inform the Pell processor that the student never came to your school.

More than one school can submit an origination record for a student. However, the Pell processor only accepts one origination record from each school for each student.

Origination records must be sent before or at the same time as disbursement records. If the Pell processor receives a disbursement record for a student who does not have an accepted origination record on file, the disbursement record is rejected.



FSA

The Origination Record: A Review

- Origination ID
- Student and school identifiers
- Award amount
  - EFC
  - Cost of Attendance
  - Enrollment status
- Verification status
- Estimated disbursement dates

6–3

## The Origination Record: A Review

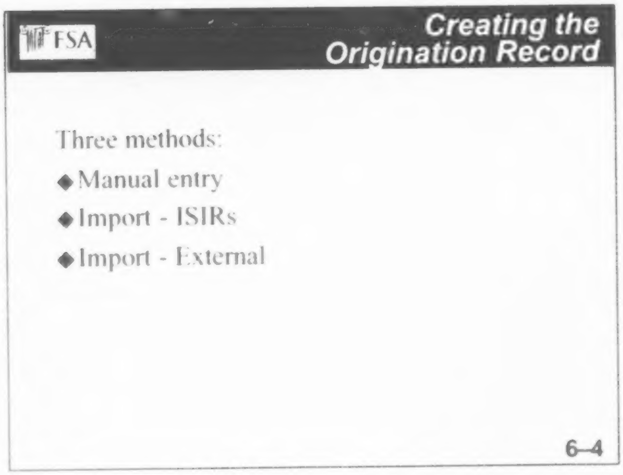
Some of the key required data elements that are carried on the origination record follow:

- Origination ID
- Student and school identifiers
- Award amount for the entire school year
- Components that are used to calculate the award amount, including EFC, cost of attendance, and enrollment status
- Verification status code
- Estimated disbursement dates

The information on the origination record is for the entire year. The award amount, cost of attendance, and enrollment status are for the award year, not for individual payment periods.

The award amount you report on the origination record is your estimate of that student's funding needs. It does not commit funds or have any effect on your authorization level. The award amount on the disbursement record, however, must be the actual amount that was disbursed to the student.

The origination record also asks for estimated disbursement dates. These dates are used by the Pell system to estimate program-wide funding needs. There are no consequences if the dates you provide turn out to be different. You will not need to update the origination record if it turns out you disburse on different dates.



FSA

**Creating the Origination Record**

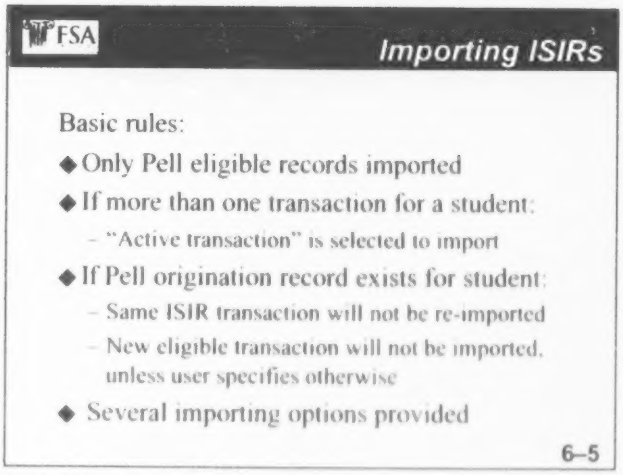
Three methods:

- Manual entry
- Import - ISIRs
- Import - External

6–4

## *Creating the Origination Record*

- **Manual Entry.** You can enter the data needed to originate the student's record on a case-by-case basis. This is the most time-consuming method. You will want to use this method only if you do not have an ISIR in your database for a student.
- **Import—ISIRs.** You can import data into the Pell module from the ISIRs that you have already imported into the App Express module of EDExpress. Note that importing ISIRs for the purpose of creating origination records is a two-step process. First, you import the ISIR file received from the CPS into the App Express module. From there, you can print ISIRS, make corrections, and so on. Then, you need to import the ISIRs from the App Express module into the Pell module.
- **Import—External.** You can import data into the Pell module from another on-campus system.



FSA

Importing ISIRs

Basic rules:

- ◆ Only Pell eligible records imported
- ◆ If more than one transaction for a student:
  - "Active transaction" is selected to import
- ◆ If Pell origination record exists for student:
  - Same ISIR transaction will not be re-imported
  - New eligible transaction will not be imported, unless user specifies otherwise
- ◆ Several importing options provided

6–5

## Importing ISIRs

Importing ISIRs is the most often used method of creating Pell origination records.

EDExpress only selects Pell eligible records to import. Pell eligible ISIRs are those with an EFC in the Pell eligible range. Rejected ISIRs do not have an EFC and, therefore, are not selected to import.

If more than one Pell eligible ISIR exists on your App Express database, the "active transaction" will be selected to import. Unless you specify otherwise, the most recent transaction (the one with the highest transaction number) will be designated as the "active transaction." You make an "inactive transaction" the "active transaction" by opening the student's record to the ISIR Review tab and selecting Process/Activate Transaction. You may also use the "Transaction Paid On: field:" on the Demo tab to designate which transaction to import.

EDExpress will not allow you to re-import the same ISIR transaction.

If you receive another Pell-eligible ISIR transaction for a student who has a Pell origination record, that new transaction will not be imported, unless you mark the Import New Eligible ISIRs? box on the Import dialogue box.

EDExpress provides the following options when importing ISIRs from App Express:

- Prompt for Duplicates?
- Include Records in Next Batch Transmission?
- Import New Eligible ISIRs?
- Import Packaging Data?
- Import by selected Reporting or Attended campus ID
- Import by Processed Date Range
- Import by Selection Criteria

A description of each of these options is provided on the following page.

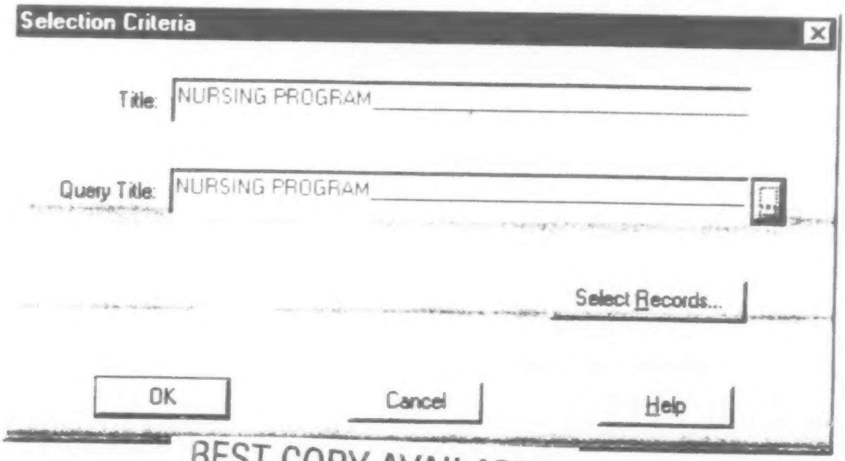
## Import Dialog Box: Data Fields

| Field | Description |
|---|---|
| **Prompt for Duplicates?** | Mark this box to be notified that a duplicate ISIR transaction was found during the import process. When a duplicate is found, the current record's Original SSN, Name ID, Origination Status, and Pell Action Status are displayed with the following options: Skip, Skip All (The default if Prompt for Duplicates? is not selected by the user) Update, and Update All. |
| **Include Records in Next Batch Transmission?** | This box is activated when the Import Packaging Data? has been marked (see below).<br>Mark this box to set the status code on all imported records to "Ready", meaning that all edits have been passed and the record can be exported. |
| **Import New Eligible ISIRs?** | Mark this box to import new eligible ISIRs received since the last import transaction into the Pell module. If a Pell origination record has been created for a student, the newly imported ISIR record will overwrite the existing Pell origination record.<br>If you leave this box unmarked, EDExpress will not import new Pell-eligible transactions for students with Pell origination records. |
| **Import Packaging Data?** | Mark this box to import records that have been packaged in EDExpress. The Pell amount awarded on the Awards tab will import into the Pell module as the Award amount for the entire school year on the Pell Grant tab.<br>New for 2002–2003: The Pell Cost of Attendance will also be imported into the Pell module when you choose the Import Packaging Data option.<br>By choosing this option, you will import all of the data required to originate a Pell record. You have the option of also marking the Include Records in Next Batch Transmission? check box (see above). |
| **Reporting /Attended Campus** | Specify the Reporting and Attended Campus ID number that you want associated with the imported records. |
| **Processed Date Range** | Choose this option to import ISIR records processed at the CPS within a specified date range. |
| **Selection Criteria** | Click this button to use a predefined or user-defined query to select certain records to import or to select specific SSNs. |

## Importing ISIRs: Instructor Demonstration

In this demonstration, we import ISIRs using a query that we have created in advance to select specific records to import.

| Step | Action |
|---|---|
| 1 | Select **File/Import** from the menu bar. The Import Dialog box displays.<br>Click the Pell tab if it is not highlighted. |
| 2 | Make sure **Origination Data - ISIRs** is displayed as the Import Type. |
| 3 | Mark **Screen** to send the output report to your screen. |
| 4 | Click the **Selection Criteria** button. |
| 5 | Click the **ellipsis button (...)**. A list of available queries displays. |
| 6 | Click **Nursing Program.**<br>This query identifies all students whose program of study is Nursing. Program of Study is not an EDExpress field. It was created as a user-defined field. |
| 7 | Click **OK.** The Selection Criteria dialog box displays (see below). |
| 8 | Click **OK** again to close the box. |
| 9 | Click **OK** to import the selected records. |
| 10 | Click **OK** to display the list of the records. Note the skipped and accepted records. |
| 11 | Click the **Close** button to exit. |



Title: NURSING PROGRAM

Query Title: NURSING PROGRAM

# Group Discussion

We have just imported ISIRs from the App Express database using a query that identifies students who are in a Nursing Program. This query was developed using a user-defined field.

1. Why might it be useful to use queries to select records to import into your Pell database?

2. What other queries might be useful in selecting records to import?

# Individual Learning Activity: #1

## Scenario

You designed a process where you create origination records separately for two groups of students.

Each day, you first complete the origination process for students whose ISIRs were:

1. Received the day before, and
2. Have not been selected for verification.

You import these records into the Pell module, add the award amounts, and export the records for transmission to the Pell processor.

Then, later in the day, you begin your process with the second group of students whose ISIRs were:

1. Received the day before, and
2. Have been selected for verification.

You begin the process of requesting verifying documents from students and parents. You wait until after verification is complete to import these records into the Pell module.

## Instructions

Begin the first phase of the process by importing records that have not been selected for verification which were processed the day before. Assume that all ISIRs received the day before are in batch **#E30999920020905090038.**

Hint:

Use a query that has been created for this training titled "Not Selected for Verification by Batch ID."

## Discussion

1. How many ISIRs were imported?

_______________________________________________

2. What other query, or method, could you have used to identify records processed on a certain date?

_______________________________________________

_______________________________________________

_______________________________________________

# Individual Learning Activity: #2

Test your knowledge about queries by answering the following true or false questions.

True or False

1. __________ You must have an accepted origination record on file at the Pell processor for every student who receives a Federal Pell Grant.

2. __________ Your origination record will be rejected if another school has submitted an origination record for the same student.

3. __________ You are required to disburse Pell Grant funds to the student on the dates you indicate on the origination record.

4. __________ Your origination record will be rejected if the student did not submit a valid, Pell Grant-eligible ISIR.

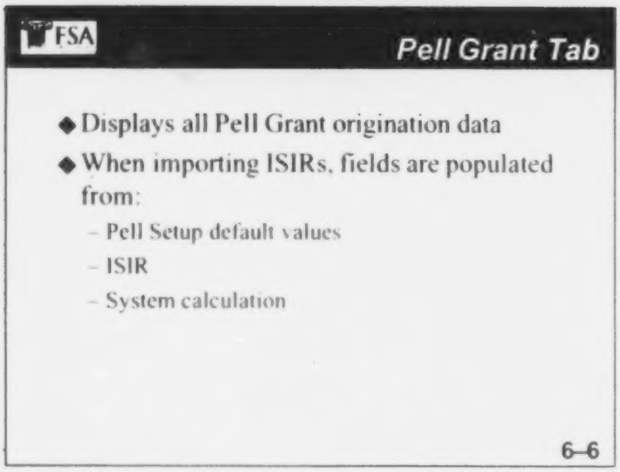
5. __________ Unless you specify otherwise, EDExpress will always select the Pell-eligible ISIR transaction with the highest transaction to import into the Pell module.

6. __________ If you have more than one Pell-eligible ISIR transaction, you can designate which one to import into the Pell module by using the Transaction Paid On field on the Demo tab.

7. __________ If you select the Import Packaging Records? option, the Pell amount awarded on the Awards tab will import into the Pell module as the Award amount for the entire school year.

8. __________ If you are using a 2001–2002 version of EDExpress, and you select the Import Packaging Records? option, the Pell cost of attendance from the Awards tab will import into the Pell module.

9. __________ Queries used to select ISIRs to import into the Pell module must be developed in the Pell module.



### Pell Grant Tab

- Displays all Pell Grant origination data
- When importing ISIRs, fields are populated from:
  - Pell Setup default values
  - ISIR
  - System calculation

6-6

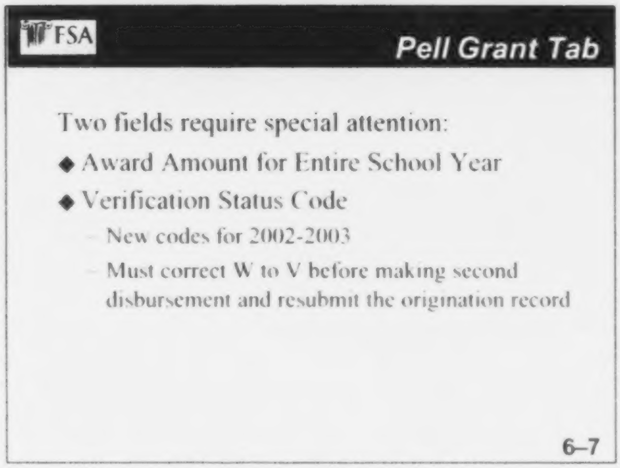
## Pell Grant Tab

Data from the origination record are displayed on the EDExpress tab titled "Pell Grant."

When you create your origination records by importing ISIRs, many of the data fields are filled in automatically with the information you provided in the Pell Grant School Setup. These fields include cost of attendance, academic calendar, payment methodology, number of payment periods in student's school year, enrollment date, and estimated disbursement dates. If the information in these fields is not correct for a particular student, change it on this screen.

The ISIR record itself is the source of information for other fields, such as the EFC and the Transaction Number.

Finally, several fields that display on the Pell Grant tab are populated based on a calculation performed by EDExpress when it creates the origination record. Total Payment Ceiling, Scheduled Award, and Record Source are among the fields that are calculated during the import process.



FSA

**Pell Grant Tab**

Two fields require special attention:

- Award Amount for Entire School Year
- Verification Status Code
  - New codes for 2002-2003
  - Must correct W to V before making second disbursement and resubmit the origination record

6–7

## Award Amount for Entire School Year

This required origination field is not populated when you import ISIRs (unless you select the Import Packaging Data? option). You can:

1. Enter the amount manually;
2. Use the Process/Calculate Award Amount For Entire School Year feature to calculate and enter the amount; or
3. Use Multiple Entry to enter the amount.

Note: Beginning in 2002–2003, schools can submit cents greater than zero in this field and have the cents processed and returned to them by the Pell system.

## Verification Status Code

New for 2002–2003, this field now has only three valid values:

| | |
|---|---|
| W | Without documentation |
| V | Verified |
| Blank | Not selected by CPS or not required to be verified |

When you import ISIRs, this field will be set to W if the ISIR is selected for verification and blank if the ISIR is not selected. The Pell processor checks the Verification Status Code submitted on the origination record when processing disbursement records. A school cannot make more than one disbursement for a student selected for verification until the student supplies documentation to verify or correct the application data. As long as the student's verification status is W ("without documentation"), the Pell processor will reject any disbursement submitted after the first disbursement, and will also correct the first disbursement if it is for more than half the scheduled award amount. As soon as you complete verification, you must submit an origination record with the revised verification status and also submit applicable disbursement records.

## Reviewing the Pell Tab: Instructor Demonstration

In this demonstration, we open up a Pell record and review the information displayed.

| Step | Action |
|---|---|
| 1 | Click the **Open icon** from the toolbar. The Open Student Dialog box displays. |
| 2 | Click the **ellipsis button** (…). A list of records displays. |
| 3 | With your cursor on the Student's Last Name—Demo column heading, **right click** your mouse. A list of options displays. |
| 4 | Select **Quick Sort Ascending.** The list sorts alphabetically by last name. |
| 5 | Click on **Kelly Bundy**'s record. Click **OK.** The Open Student Dialog box redisplays with her SSN populating the field. |
| 6 | Click **OK.** Her Demo tab displays. |
| 7 | Click the **Pell Grant tab**.<br>Review the fields on her record, noting each of the fields that were populated during the import process. A complete list of fields on the Pell Grant tab can be found on the following five pages. Note that the screen has been reorganized for 2002-2003. All data elements that display on this screen are grouped in a more logical order. The Weeks and Hours fields, for example, are listed together in one column. |
| 8 | Select **Process/Calculate Award Amount For Entire School Year** from the menu bar. Note that EDExpress calculates the student's Award Amount for the Entire Year based upon the EFC, Cost of Attendance, and Enrollment Status. |
| 9 | Enter **V** for the Verification Status Code. V indicates that the verification process for this student has been completed. |
| 10 | Click the **Diskette icon** on the toolbar to save the record. |
| 11 | Click **Yes** to mark the record as ready to send to the Pell processor. Note that the Origination Status has changed to Ready. |
| 12 | Click the **Close icon** to close the record. |

## Data Fields on the Pell Grant Tab

| Data Field | Description | Source |
|---|---|---|
| Original SSN | Student's Social Security Number from the original FAFSA. | ISIR |
| Original Name Code | The first two characters of the student's last name from the original FAFSA. | ISIR |
| Total Payment Ceiling | It is calculated from the Payment Schedule using the EFC, the formula for payment methodology, and the eligibility used from transfer records and multiple school origination records created for the student. | Calculated by software. |
| Scheduled Award | The amount that would be paid to the student if the student attended full-time for a full academic year within this Pell Grant award year based upon the student's EFC and COA. | Calculated by software. |
| Total of Disbursement Amounts | The total amount disbursed to the student during the current school year. | Calculated by software |
| Reporting Campus ID | The Title IV School Code of the campus administering the Federal Pell Grant Program. | Pell School Setup |
| Attended Campus ID | The Pell identification number of the attended campus. For Reporting Campuses that have branch campuses with unique Pell IDs, this is the campus the student attends. | Pell School Setup |
| Origination ID | The key to the Pell data record. It consists of the following: Original SSN, Original Name Code, award year, attended campus Pell ID, and the origination sequence # assigned by EDExpress. | Calculated by software |
| Origination Status | Indicates the current status of the origination record. Valid entries include:<br>A = Accepted<br>B = Batched<br>E = Rejected<br>N = Not Ready<br>R = Ready | Calculated by software |
| Origination Processed Date | The date the origination record was processed by the Pell processor. It reflects the last imported transaction. In a record that has not yet been sent, processed, and returned by Pell, this field is blank. | Origination Acknowledgement |

## Data Fields on the Pell Grant Tab (continued)

| Data Field | Description | Source |
|---|---|---|
| Pell Action Status | Formerly RFMS Status, this is the code designating the result of the Pell processor for the student record. In a record that has not yet been sent, processed, and returned by Pell, this field is blank. Valid values are:<br>Accepted: All fields accepted<br>Corrected: One or more fields corrected<br>Duplicate: Duplicate of an accepted record<br>Rejected: Record was rejected by Pell processor | Origination Acknowledgement |
| Batch ID | This number is generated by EDExpress when a school batches a group of records.<br>The batch ID is unique to that batch and its format is specified. | Calculated by software |
| Last Updated:<br>User<br>Date<br>Time | The ID of the user who created, or last updated, the origination or disbursement record.<br>The date and the time that the origination or disbursement record was created, or last updated. | Calculated by software |
| Record Source | This field displays how the record was originated. Possible values are:<br>E = External Import<br>I = ISIR Originated<br>L = Direct Loan<br>M = Manually Originated<br>P = Packaging<br>O = Pell Origination Acknowledgement<br>W = Pell Origination Acknowledgement—Web<br>X = Pell YTD | Calculated by software |
| Transaction Number | Identifies a valid Pell-eligible transaction used to calculate and disburse the student's award. | ISIR |

## Data Fields on the Pell Grant Tab (continued)

| Data Field | Description | Source |
|---|---|---|
| EFC | The Expected Family Contribution for the student. EFC is used with COA to determine the student's Scheduled Federal Pell Grant. | ISIR |
| Secondary EFC Code | Indicates whether the EFC or the Secondary EFC is represented. Possible values are:<br>S = Award based upon Secondary EFC<br>O = Award previously based upon Secondary EFC<br>Blank = Award based on Primary EFC | ISIR |
| Cost of Attendance | A five-digit dollar amount that is used with EFC to determine the student's scheduled Federal Pell Grant. | Defaulted from Pell School Setup or imported from Packaging module (Awards tab).<br>Updateable. |
| Academic Calendar | Calendar that applies to the student's educational program. Valid values are:<br>1 = Credit hour<br>2 = Quarter<br>3 = Semester<br>4 = Trimester<br>5 = Clock hour<br>6 = Credit hour without terms | Defaulted from Pell School Setup<br>Updateable. |
| Payment Methodology | These are standard formulas used to calculate student awards, established by the final Federal Pell Grant Program regulations.<br>For more information, see Chapter 4 of the *Federal Student Financial Aid Handbook 2002–2003*. | Defaulted from Pell School Setup.<br>Updateable. |
| Enrollment Status | The student's expected enrollment status for the award year.<br>1 = Full time<br>2 = Three-quarter time<br>3 = Half-time<br>4 = Less than half-time<br>5 = Other<br>Blank | Defaulted from Pell School Setup.<br>Updateable. |
| Origination Cross Reference | This field can contain any cross-reference information useful for the school to identify student records internally. | |

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## *Data Fields on the Pell Grant Tab (continued)*

| Data Field | Description | Source |
|---|---|---|
| Weeks of Instructional Time Used to Calculate Payment | The weeks of instructional time in which the student will be enrolled and paid, as part of the academic year or program as defined for each payment methodology. | Defaulted from Pell School Setup.<br>Updateable. |
| Weeks of Instructional Time in Program's Academic Year | The number of weeks of instructional time in the program's academic year. Must be non-blank with Payment Methodologies 2, 3, 4, or 5. | Defaulted from Pell School Setup.<br>Updateable. |
| Credit/Clock Hours Expected to Complete This School Year | The total number of credit hours or clock hours you expect the student to complete and to be paid for the award year. Complete this field for students enrolled in a program that:<br>• Measures progress in clock hours,<br>• Measures progress in credit hours but does not have terms, or<br>• Has a nonresidential portion offered by correspondence and does not use terms. | Defaulted from Pell School Setup.<br>Updateable. |
| Credit/Clock Hours in Program's Academic Year | The number of credits or clock hours in this student's program's academic year. This must be valid for Payment Methodology 4 and 5. | Defaulted from Pell School Setup.<br>Updateable. |
| Award Amount for Entire School Year | The amount of the Pell Grant award for the student's entire school year. This amount must be provided on the origination record. Any change to this amount must be submitted to the Pell processor. This field , was formerly called the Origination Award Amount for Entire School Year. | Calculated using the Process/ Calculate Award Amount For Entire School Year feature.<br>Imported from Packaging module (Awards tab).<br>Updateable. |
| Verification Status Code | A code that best describes the method under which you made payment to the student, as described in the Verification Handbook.<br>V = Verified<br>W = Without documentation<br>Blank = Not selected by CPS or not required to be verified | W is applied to this field if the ISIR record indicates that the record was selected for verification. Blank is applied to the field if the ISIR is not selected.<br>Updateable. |

## Data Fields on the Pell Grant Tab (continued)

| Data Field | Description | Source |
|---|---|---|
| Low Tuition & Fees Code | Click the down arrow and select the valid tuition range. For the low tuition to apply to your school, the tuition cost must fall into one of these tuition ranges. If left blank, the low tuition does not apply.<br>1 0<br>2 1-216<br>3 217–433<br>4 434–649 | |
| Enrollment Date | The date classes begin for the student's program in the 2002–2003 school year. Your entry can range from 01012002 (January 2002) to 06302003 (June 2003). | Defaulted from Pell School Setup.<br>Updateable. |
| Incarcerated? | This code indicates the incarcerated status of students who are in local penal facilities, but are otherwise eligible to receive Federal Pell Grants. This code can be one of the following:<br>Blank = Not incarcerated<br>Y = Yes, the student is incarcerated in a local penal facility but is otherwise eligible to receive a Federal Pell Grant<br>N = Not (or no longer) incarcerated, if the student was previously reported as incarcerated<br>If the answer is N (No), but the student had previously reported Y (Yes), you must report N. | |
| School Internal Sequence Number | This optional three-byte alpha/numeric field can be used by schools to track different versions of the origination record. The Pell processor does not edit this field, and will return the field in the Origination Acknowledgement file.<br>New for 2002–2003: This field is available in Query, Browse, and File Formats. | |
| Estimated Disbursement Dates | Enter up 15 estimated disbursement dates for your school. The first estimated disbursement date is required. | Defaulted from Pell School Setup.<br>Updateable. |

# Individual Learning Activity: #3

## *Instructions*

How well are you able to interpret the data on the Pell Grant tab?

Screens for four students are displayed on the following four pages.

Match the statement on the left with the student on the right by drawing a line. The first one has been completed for you.

**Statement**

1. This record was created on March 10, 2002 from importing an ISIR from the App Express module
2. The origination record and both disbursement records have been accepted by the Pell processor.
3. This record is not ready to send to the Pell processor. One more data element needs to be entered.
4. Verification has not been completed, and the processor has accepted the first disbursement.
5. The origination record was exported August 22, 2002 and the last disbursement acknowledgement record was imported September 3, 2002.
6. This record is not ready to send to the Pell processor. However, all required data elements are present.

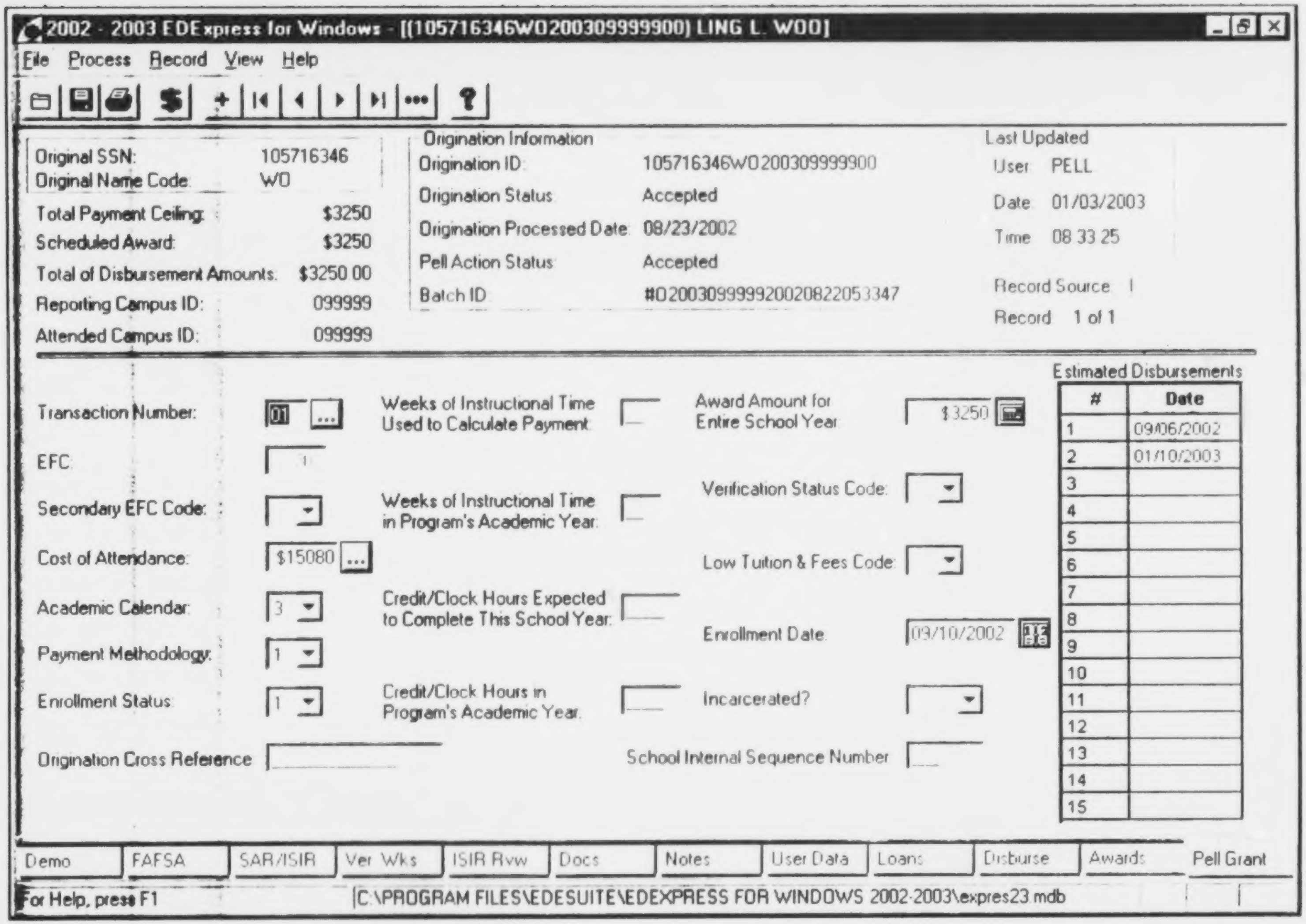
**Student**

Ling L. Woo

Seymour K. Skinner

Doris M. Lunchlady

Kate R. Austin



2002 - 2003 EDExpress for Windows - [(105716346WO200309999900) LING L. WOO]

Original SSN: 105716346
Original Name Code: WO
Total Payment Ceiling: $3250
Scheduled Award: $3250
Total of Disbursement Amounts: $3250.00
Reporting Campus ID: 099999
Attended Campus ID: 099999

Origination Information
Origination ID: 105716346WO200309999900
Origination Status: Accepted
Origination Processed Date: 08/23/2002
Pell Action Status: Accepted
Batch ID: #O200309999920020822053347

Last Updated
User: PELL
Date: 01/03/2003
Time: 08 33 25
Record Source: I
Record: 1 of 1

Transaction Number: 01
EFC: 1
Secondary EFC Code:
Cost of Attendance: $15080
Academic Calendar: 3
Payment Methodology: 1
Enrollment Status: 1
Origination Cross Reference:

Weeks of Instructional Time Used to Calculate Payment:
Weeks of Instructional Time in Program's Academic Year:
Credit/Clock Hours Expected to Complete This School Year:
Credit/Clock Hours in Program's Academic Year:

Award Amount for Entire School Year: $3250
Verification Status Code:
Low Tuition & Fees Code:
Enrollment Date: 09/10/2002
Incarcerated?
School Internal Sequence Number:

Estimated Disbursements

| # | Date |
|---|---|
| 1 | 09/06/2002 |
| 2 | 01/10/2003 |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |
| 11 | |
| 12 | |
| 13 | |
| 14 | |
| 15 | |

For Help, press F1
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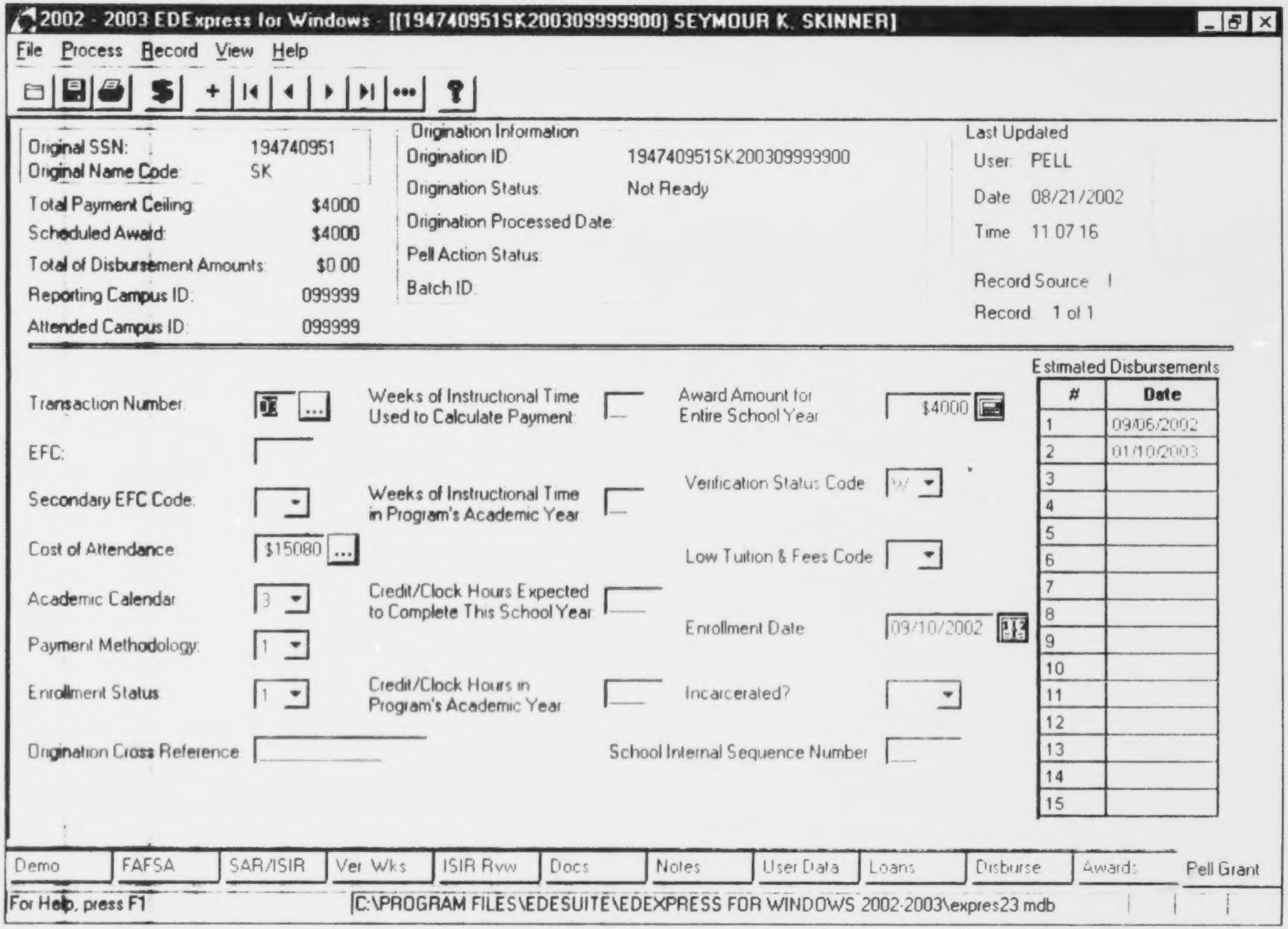

2002 - 2003 EDExpress for Windows - [[194740951SK200309999900] SEYMOUR K. SKINNER]

Original SSN: 194740951
Original Name Code: SK
Total Payment Ceiling: $4000
Scheduled Award: $4000
Total of Disbursement Amounts: $0.00
Reporting Campus ID: 099999
Attended Campus ID: 099999

Origination Information
Origination ID: 194740951SK200309999900
Origination Status: Not Ready
Origination Processed Date:
Pell Action Status:
Batch ID:

Last Updated
User: PELL
Date: 08/21/2002
Time: 11:07:16
Record Source: I
Record: 1 of 1

Transaction Number: 01
EFC:
Secondary EFC Code:
Cost of Attendance: $15080
Academic Calendar: 3
Payment Methodology: 1
Enrollment Status: 1
Origination Cross Reference:
Weeks of Instructional Time Used to Calculate Payment:
Weeks of Instructional Time in Program's Academic Year:
Credit/Clock Hours Expected to Complete This School Year:
Credit/Clock Hours in Program's Academic Year:
Award Amount for Entire School Year: $4000
Verification Status Code: W
Low Tuition & Fees Code:
Enrollment Date: 09/10/2002
Incarcerated?
School Internal Sequence Number:

Estimated Disbursements

| # | Date |
|---|---|
| 1 | 09/06/2002 |
| 2 | 01/10/2003 |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |
| 11 | |
| 12 | |
| 13 | |
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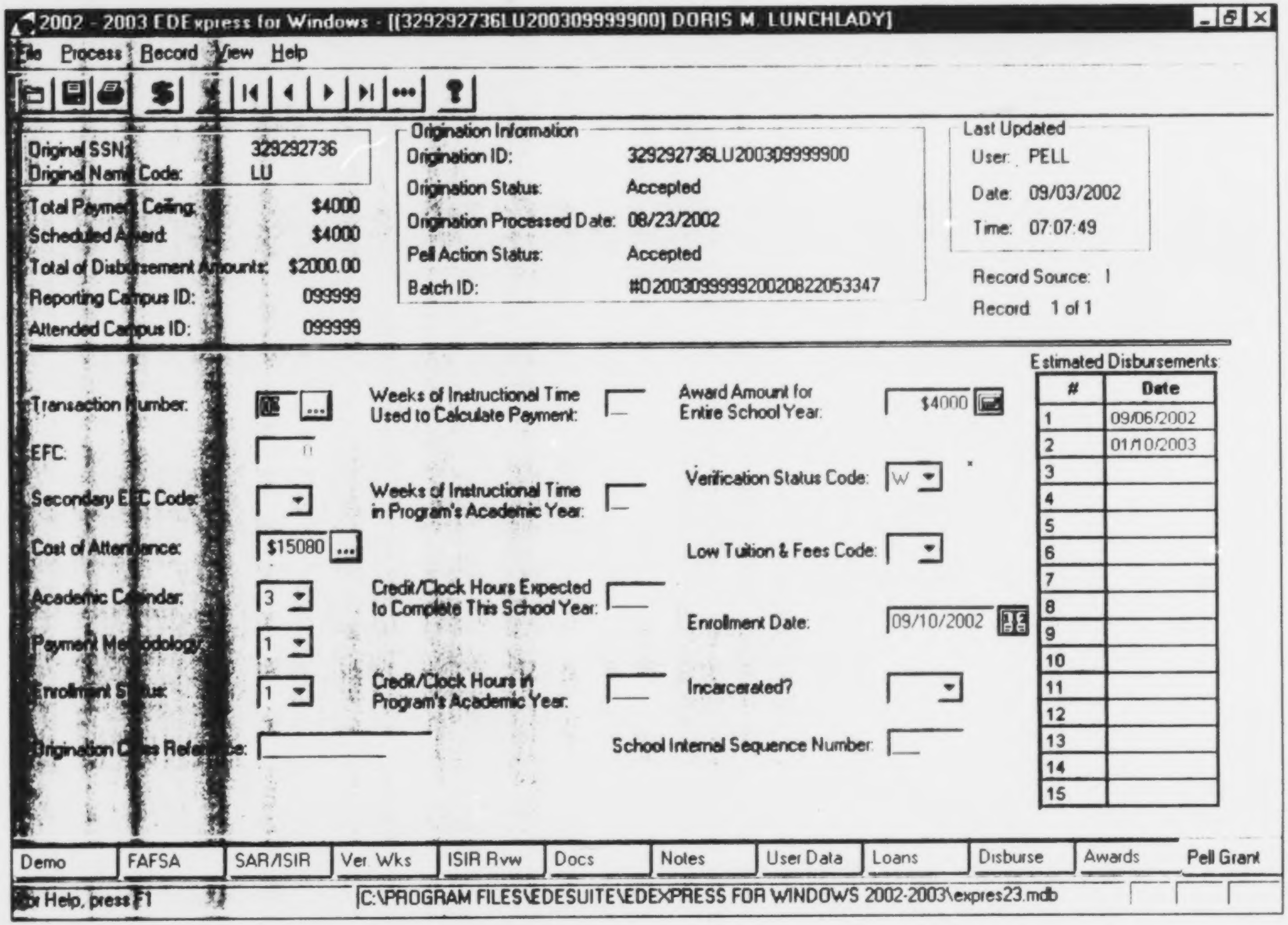

2002 - 2003 EDExpress for Windows - [(329292736LU200309999900) DORIS M. LUNCHLADY]

Original SSN: 329292736
Original Name Code: LU
Total Payment Ceiling: $4000
Scheduled Award: $4000
Total of Disbursement Amounts: $2000.00
Reporting Campus ID: 099999
Attended Campus ID: 099999

Origination Information
Origination ID: 329292736LU200309999900
Origination Status: Accepted
Origination Processed Date: 08/23/2002
Pell Action Status: Accepted
Batch ID: #O200309999920020822053347

Last Updated
User: PELL
Date: 09/03/2002
Time: 07:07:49

Record Source: 1
Record 1 of 1

Transaction Number: 02
EFC: 0
Secondary EFC Code:
Cost of Attendance: $15080
Academic Calendar: 3
Payment Methodology: 1
Enrollment Status: 1
Origination Cross Reference:

Weeks of Instructional Time Used to Calculate Payment:
Weeks of Instructional Time in Program's Academic Year:
Credit/Clock Hours Expected to Complete This School Year:
Credit/Clock Hours in Program's Academic Year:

Award Amount for Entire School Year: $4000
Verification Status Code: W
Low Tuition & Fees Code:
Enrollment Date: 09/10/2002
Incarcerated?
School Internal Sequence Number:

Estimated Disbursements:

| # | Date |
|---|---|
| 1 | 09/06/2002 |
| 2 | 01/10/2003 |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |
| 11 | |
| 12 | |
| 13 | |
| 14 | |
| 15 | |

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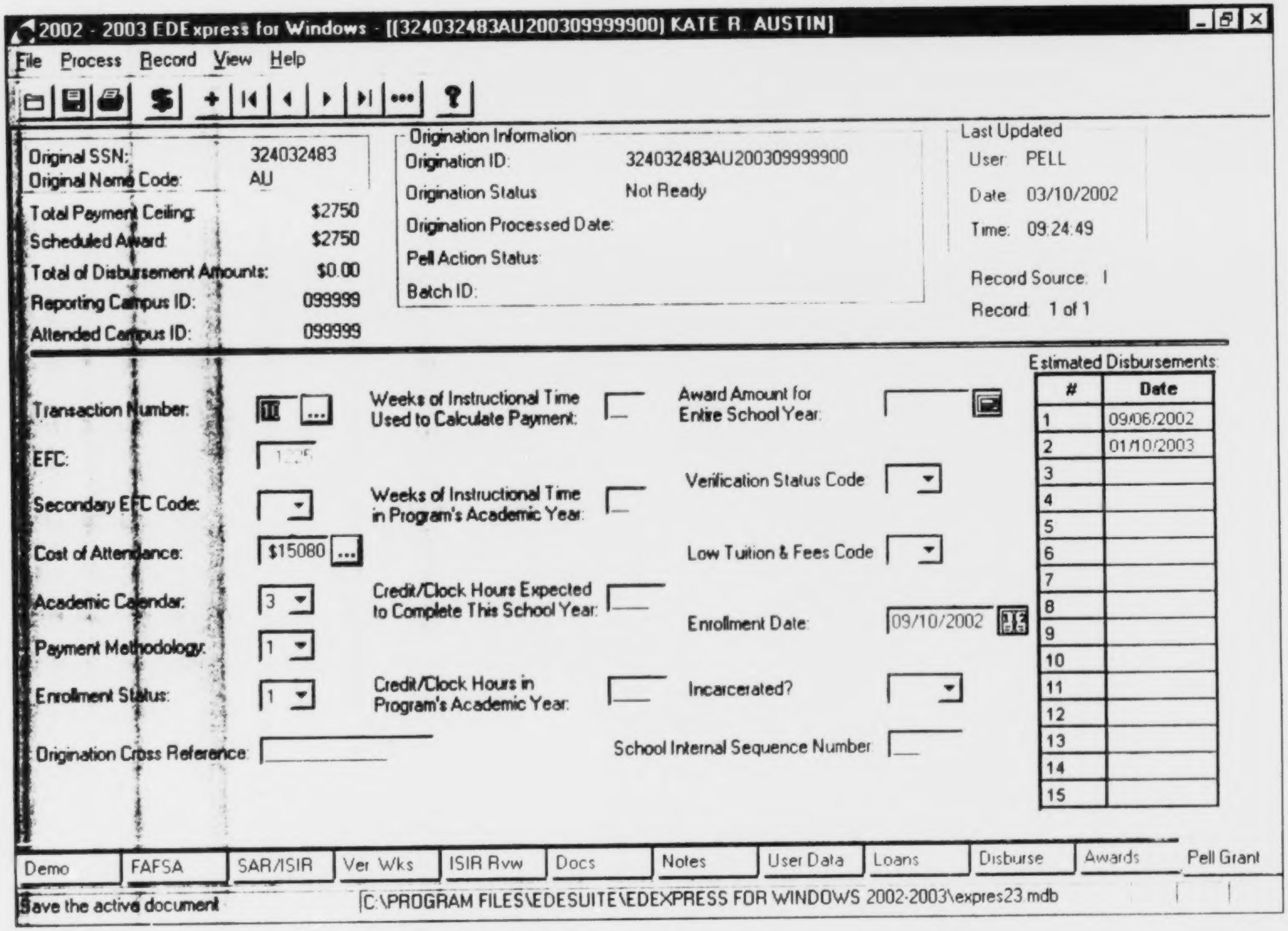

2002 - 2003 EDExpress for Windows - [(324032483AU200309999900) KATE R. AUSTIN]

Original SSN: 324032483
Original Name Code: AU
Total Payment Ceiling: $2750
Scheduled Award: $2750
Total of Disbursement Amounts: $0.00
Reporting Campus ID: 099999
Attended Campus ID: 099999

Origination Information
Origination ID: 324032483AU200309999900
Origination Status: Not Ready
Origination Processed Date:
Pell Action Status:
Batch ID:

Last Updated
User: PELL
Date: 03/10/2002
Time: 09:24:49

Record Source: I
Record: 1 of 1

Transaction Number: 01
EFC: 1225
Secondary EFC Code:
Cost of Attendance: $15080
Academic Calendar: 3
Payment Methodology: 1
Enrollment Status: 1
Origination Cross Reference:

Weeks of Instructional Time Used to Calculate Payment:
Weeks of Instructional Time in Program's Academic Year:
Credit/Clock Hours Expected to Complete This School Year:
Credit/Clock Hours in Program's Academic Year:

Award Amount for Entire School Year:
Verification Status Code
Low Tuition & Fees Code
Enrollment Date: 09/10/2002
Incarcerated?
School Internal Sequence Number

Estimated Disbursements

| # | Date |
|---|---|
| 1 | 09/06/2002 |
| 2 | 01/10/2003 |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |
| 11 | |
| 12 | |
| 13 | |
| 14 | |
| 15 | |

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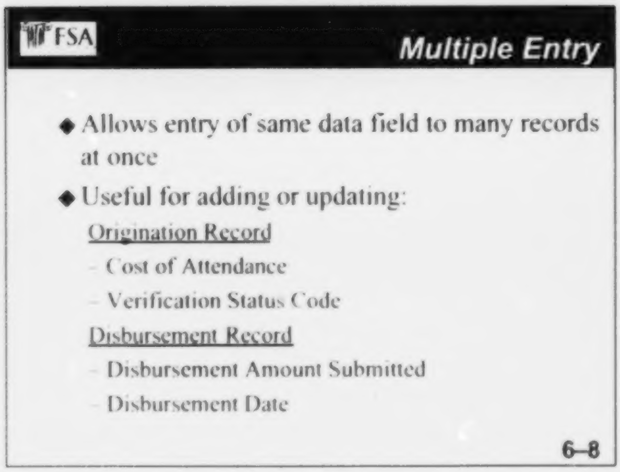


FSA

**Multiple Entry**

- Allows entry of same data field to many records at once
- Useful for adding or updating:

  Origination Record
  - Cost of Attendance
  - Verification Status Code

  Disbursement Record
  - Disbursement Amount Submitted
  - Disbursement Date

6–8

## Multiple Entry

The Multiple Entry function can be used to add the same piece of information to many records at once.

Multiple Entry will be useful any time you have a group of students whose information is different from the default values that you entered in the Pell Grant School Setup. For example, you might use Multiple Entry if you have a group of students with a Pell Grant cost of attendance that is different than the amount that you entered in the first cost of attendance field in the Pell Grant School Setup. (Remember: the amount that is entered in the first cost of attendance field automatically populates each student's Pell Grant origination record upon creation.)

You might also use Multiple Entry to update the Verification Status Code field. For example, if you have completed verification for a group of students, use Multiple Entry to update their status codes from W to V or blank.

Finally, Multiple Entry can be a real timesaver when adding the Disbursement Amount Submitted and the Disbursement Date to each disbursement record. Remember: In Session 5, you created a query that would allow you to rapidly enter disbursement amounts and dates to groups of records.

## *Using Multiple Entry: Instructor Demonstration*

In this demonstration, we use Multiple Entry to update the cost of attendance for students in the Nursing Program who have a different Pell Grant cost of attendance than others in the school.

| Step | Action |
|---|---|
| **1** | Select **Process/Multiple Entry/Pell** from the menu bar. The Pell Multiple Entry dialog box displays. |
| **2** | Mark the box in the Select column between 1. and **Cost of Attendance**. |
| **3** | Click the **Value cell** for Cost of Attendance and enter **3500**. This is the cost of attendance that will be applied to each record you select. |
| **4** | Click **Screen** as the Report Destination. |
| **5** | Click the **Selection Criteria** button. |
| **6** | Click the **ellipsis** button (…). A list of available queries displays. |
| **7** | Click **Nursing Program.**<br>This query identifies all students whose program of study is Nursing. Program of Study is not an EDExpress field. It was created as a user-defined field. |
| **8** | Click **OK.** The Selection Criteria dialog box displays. |
| **9** | Click **OK** again to close the box. |
| **10** | Click **OK.** A list of records that match your Query display. |
| **11** | At this point, you can make changes to individual records. Update the cost of attendance for Borton from $3,500 to $7,000. |
| **12** | Click **Save.** Then click **Yes** twice to save the selected records with the new cost of attendance values. The Multiple Entry Edit report displays showing the number of records updated. |
| **13** | Click the **Close** button to exit. |

# Individual Learning Activity: #4

## Scenario

You have been assigned to complete verification for all students with Last Names from A to J. This morning you completed your assignment. Now you need to update the Verification Status Code on all of your records.

## Instructions

Use Multiple Entry to a change the Status Code from W to V on all records with Last Names from A to J.

Hint:

A query has been provided to you that identifies all student records with Last Names from A to J and a Verification Status Code of W. It is titled: Last Name from A to J and Verification Status is W.

## Discussion

1. What other queries might be useful in selecting students to update the Verification Status Code from W to V?

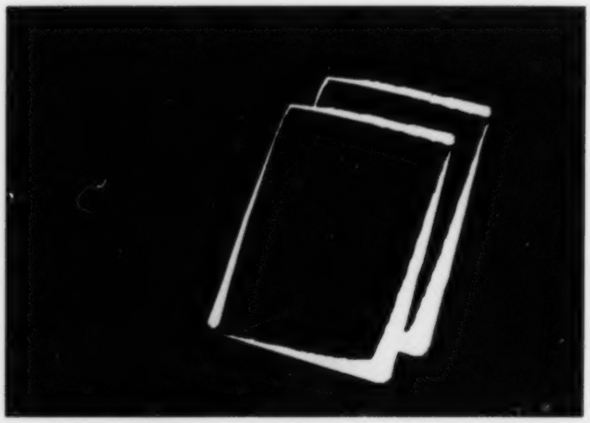
   ______________________________________________

2. What other ways could you use Multiple Entry to update your Pell database?

   ______________________________________________

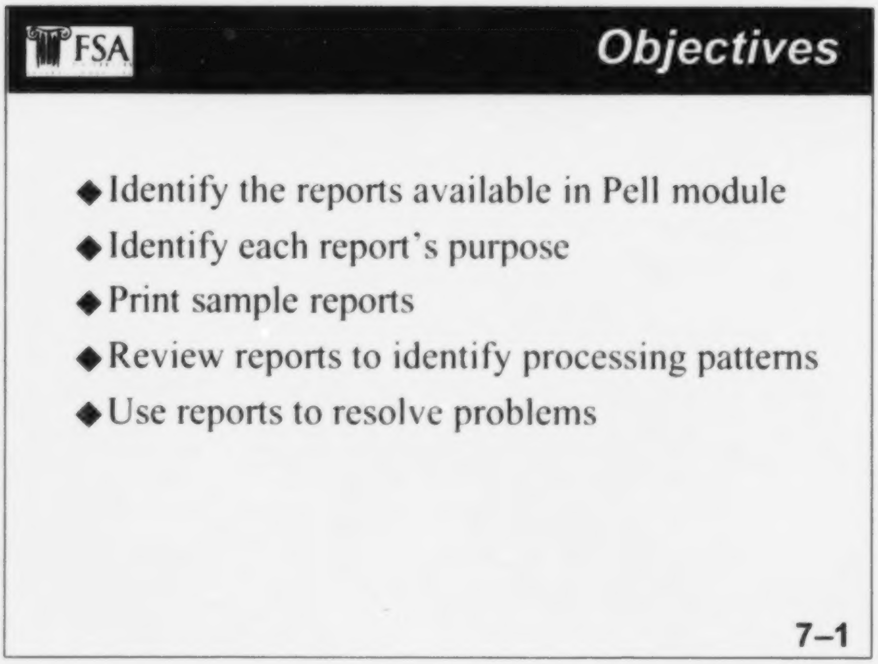
   ______________________________________________

   ______________________________________________



# *Getting the Most Out of Reports*

# Session 7: Getting the Most Out of Reports



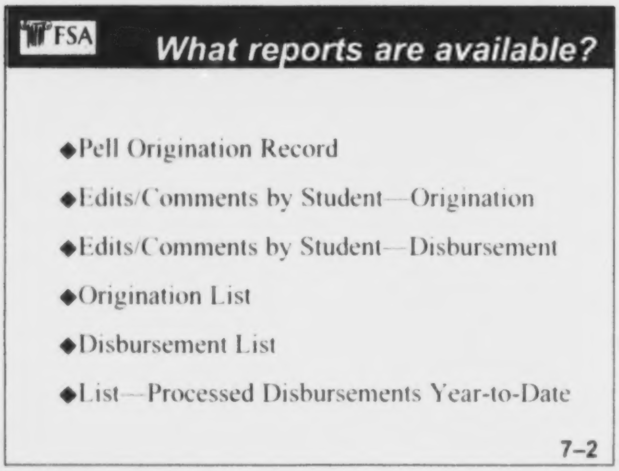
## Objectives

- Identify the reports available in Pell module
- Identify each report's purpose
- Print sample reports
- Review reports to identify processing patterns
- Use reports to resolve problems

# Key Terms

## *SSN File*

A text file of a particular group of SSNs that you create in order to view multiple records in report form.



FSA

**What reports are available?**

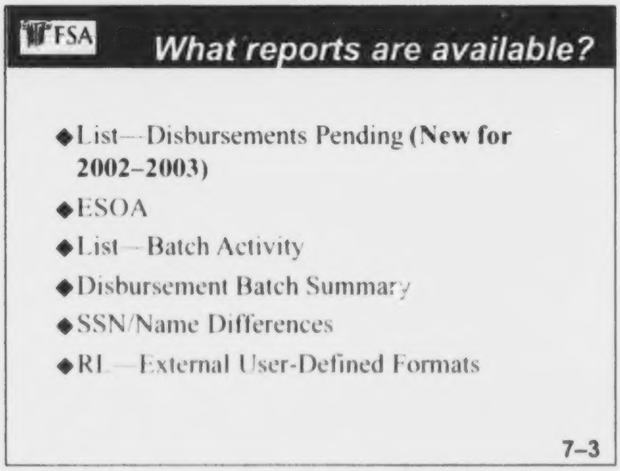
- ◆Pell Origination Record
- ◆Edits/Comments by Student—Origination
- ◆Edits/Comments by Student—Disbursement
- ◆Origination List
- ◆Disbursement List
- ◆List—Processed Disbursements Year-to-Date

7–2

## What Reports Are Available in Pell?

The Pell module of EDExpress provides 12 different reports to assist in managing Pell Grant origination and disbursement records. These reports include:

- Pell Origination Record
- Edits/Comments by Student—Origination
- Edits/Comments by Student—Disbursement
- Origination List
- Disbursement List
- List—Processed Disbursements Year-to-Date



FSA

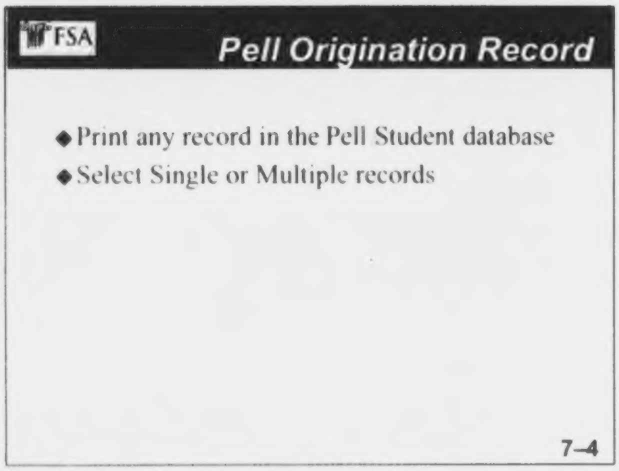
## What reports are available?

- List—Disbursements Pending **(New for 2002–2003)**
- ESOA
- List—Batch Activity
- Disbursement Batch Summary
- SSN/Name Differences
- RL—External User-Defined Formats

7–3

# What reports are available in Pell? (continued)

- List—Disbursements Pending **(New for 2002–2003)**
- Electronic Statement of Account (ESOA)
- List—Batch Activity
- Disbursement Batch Summary
- SSN/Name Differences
- RL—External User-Defined Formats (formerly External Origination Add Records)



**Pell Origination Record**

- Print any record in the Pell Student database
- Select Single or Multiple records

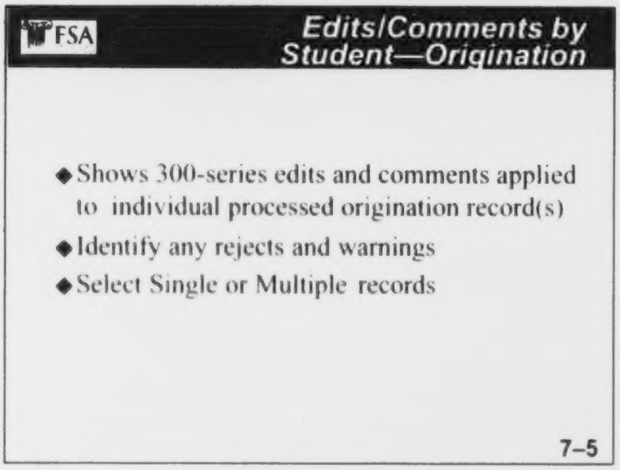
7–4

## Pell Origination Record

This report prints any record on your school's Pell student database.

You have the option of selecting a single record or multiple records. For single records, the student's SSN must be specified. For multiple records, reporting campus and attended campus must be selected and you have the option of sorting the report by the student's name or origination ID. You also have the option of printing the edits and comments that appear on the record, as well as disbursement information for the student.

Use this report to review all of the information on one or more origination records. For example, if you wanted to review the details on multiple origination records, it would be quicker to print this report than to open and review the Pell Grant tab screen for each individual student.



FSA

**Edits/Comments by Student—Origination**

- ◆ Shows 300-series edits and comments applied to individual processed origination record(s)
- ◆ Identify any rejects and warnings
- ◆ Select Single or Multiple records

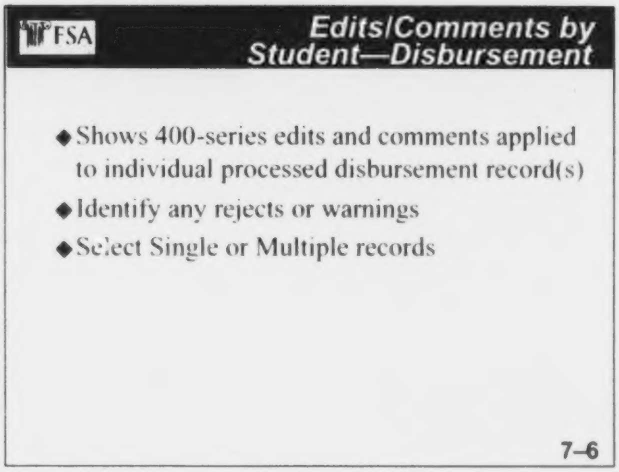
## Edits/Comments by Student—Origination

This report shows the 300-series edits and comments applied to processed origination records.

You have the option of selecting a single record or multiple records. For single records, the student's SSN must be specified. For multiple records, reporting campus and attended campus must be selected.

You would use this report to identify corrected or rejected origination records so you may take the appropriate action. You could create a query that selects records meeting a specific edit code, and print this report using the query. For example, if you wanted to know how many duplicate origination records had been processed, you would print this report using a query that selects records meeting edit code 331.

Note: A list of all the edit codes and their translations print at the end of this report. They can be found in Appendix C.



FSA

**Edits/Comments by Student—Disbursement**

- Shows 400-series edits and comments applied to individual processed disbursement record(s)
- Identify any rejects or warnings
- Select Single or Multiple records

7–6

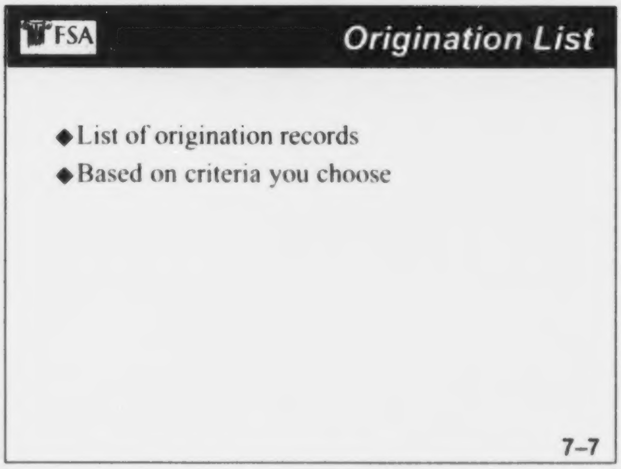
## Edits/Comments by Student—Disbursement

This report shows the 400-series edits and comments applied to processed disbursement records.

You have the option of selecting a single record or multiple records. For single records, the student's SSN must be specified. For multiple records, reporting campus and attended campus must be selected.

You would use this report to identify corrected or rejected disbursement records so you may take the appropriate action. You could create a query that selects records meeting a specific edit code, and print this report using the query. For example, if you wanted to know how many concurrent enrollment records had been processed, you would print this report using a query that selects records meeting edit code 410.

Note: A list of all the edit codes and their translations print at the end of this report. They can be found in Appendix C.



FSA **Origination List**

- List of origination records
- Based on criteria you choose

7–7

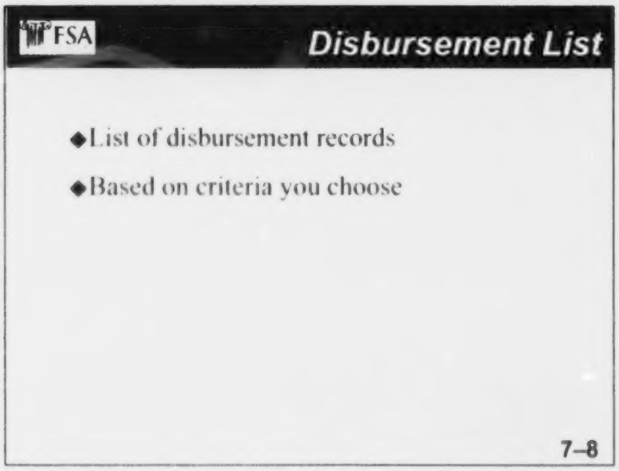
## Origination List

While the Pell Origination Record Report prints all of the origination data for a student, the Origination List displays two lines of information per student record including:

- Student's Name
- Transaction Number
- EFC
- Award Amount for Entire School Year
- Scheduled Award
- Origination Status
- Pell Action Status
- Origination Processed Date
- Record Source
- Origination ID

Students' origination records are selected based on criteria that you specify. If no criteria are specified, all of your Pell origination records will print. You have the option of printing by reporting and attended campus, as well as using a query to select specific records to print.

You use this report to determine which records are accepted, rejected, corrected, or duplicate.



FSA **Disbursement List**

- ◆List of disbursement records
- ◆Based on criteria you choose

7–8

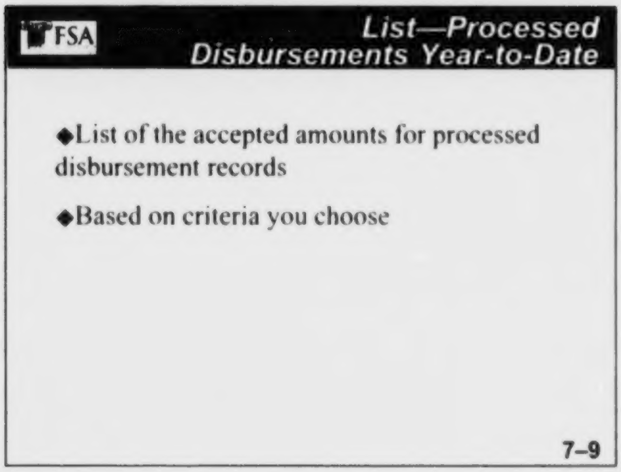
## Disbursement List

This report displays two lines of information for each disbursement record, including:

- Student's Name
- Disbursement Number
- Disbursement Date
- Submitted Disbursement Amount
- Accepted Amount (by the Pell processor)
- Disbursement Status
- Pell Action Status
- Origination ID
- Transaction Number

Students' disbursement records are selected based on criteria that you specify. If no criteria are specified, all of your Pell disbursement records will print. You have the option of printing by reporting and attended campus, as well as using a query to select specific records to print.

Also, beginning in 2002–2003, you have the option of printing verification W students with total disbursements greater than zero only. If your school processes origination records without having complete documentation, you could use this option to identify any students still needing verification.



FSA

**List—Processed Disbursements Year-to-Date**

◆List of the accepted amounts for processed disbursement records

◆Based on criteria you choose

7–9

## List—Processed Disbursements Year-to-Date

While the Disbursement List displays all disbursement records that have been created in EDExpress, the List—Processed Disbursements Year-to-Date Report shows one line of information for each student who has had disbursement records accepted by the Pell processor. The following information is displayed for each student:

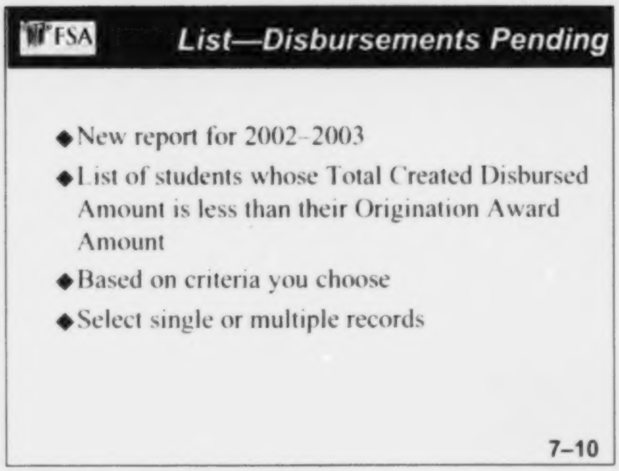
- Student Name
- Transaction Number
- Origination ID
- Accepted Year-to-Date Amount (sum of all accepted disbursement amounts)
- Award Amount for Entire Year

In addition, these totals are displayed for the specified attended campus and reporting campus:

- Total number of accepted records
- Total year-to-date accepted disbursement amount

Student records are displayed based on the criteria you define. If you don't specify any criteria, then all the records in your school's Pell database will print. You have the option of printing by reporting and attended campus, as well as using a query to select specific records to print.

You would use this report to determine the amount that the Pell processor has accepted to be paid to a specific student. You might also use this report if you wanted to know the total amount of accepted disbursements for your school.



FSA **List—Disbursements Pending**

- ◆New report for 2002–2003
- ◆List of students whose Total Created Disbursed Amount is less than their Origination Award Amount
- ◆Based on criteria you choose
- ◆Select single or multiple records

7–10

## List—Disbursements Pending

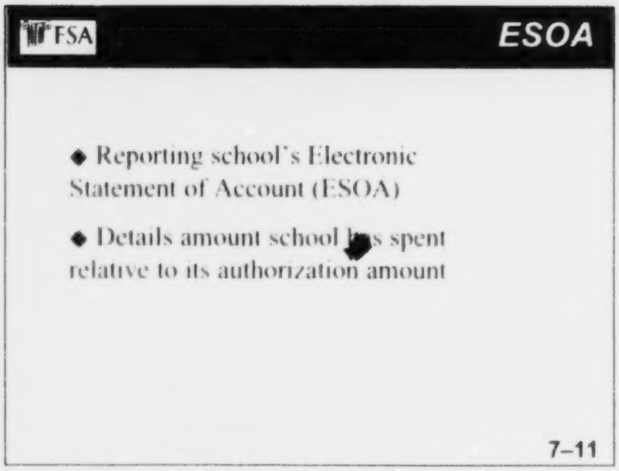
This is a new report for 2002–2003 that lists students whose total disbursed amount is less than their Award Amount for the Entire Year as reported on the origination record. This report displays two lines of information for each student, including:

- Student's Name
- Award Amount for Entire Year
- Total Disbursement Amount Created (the sum of all accepted/created disbursement amounts)
- Remaining Disbursements to be Created (Award Amount for Entire Year minus Total Disbursement Amount Created value)
- Origination ID

In addition, these totals are displayed for the specified attended campus and reporting campus:

- Total award amount
- Total submitted disbursement amount (if not accepted)
- Total accepted disbursement amount
- Total remaining disbursements to be created
- Total year-to-date accepted disbursement amount
- Total disbursement records pending

Student records are displayed based on the criteria you define. If you don't specify any criteria, then all the records in your school's Pell database will print. You have the option of printing by reporting and attended campus, as well as using a query to select specific records to print. You also have the option to include records with no disbursements and to print the totals only. You would use this report to determine the remaining amount to be disbursed and paid to a student, or to see if any students were awarded funds that were not disbursed.



FSA

## ESOA

- Reporting school's Electronic Statement of Account (ESOA)
- Details amount school has spent relative to its authorization amount

7–11

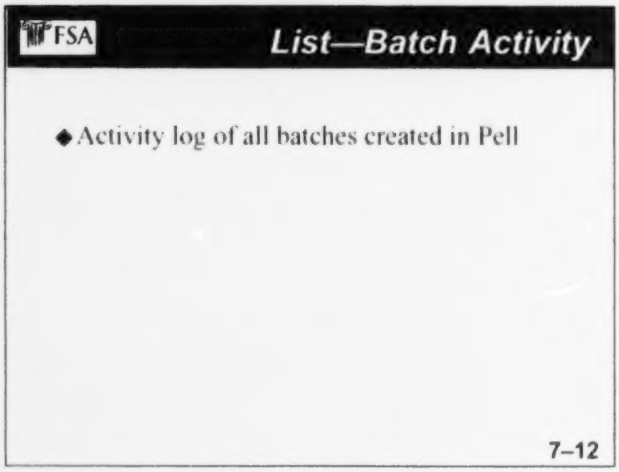
## ESOA

This report prints a reporting school's Electronic Statement of Account (ESOA) that details the amount the school has spent relative to its authorization amount. The amount expended to date corresponds to the total amount of Pell disbursement records that the Pell processor has accepted from your school. You have the option of selecting a single record (which prints by batch ID) or multiple records (which prints by Reporting Campus). You also have the option of printing the detailed ESOA.

You would use this report to check your school's total spending (including all disbursements) against your authorization amount, which is based on accepted disbursement records.

Also, for Advanced Funded schools, this report can be used to check your initial authorization level.

13



FSA **List—Batch Activity**

- ◆ Activity log of all batches created in Pell

7–12

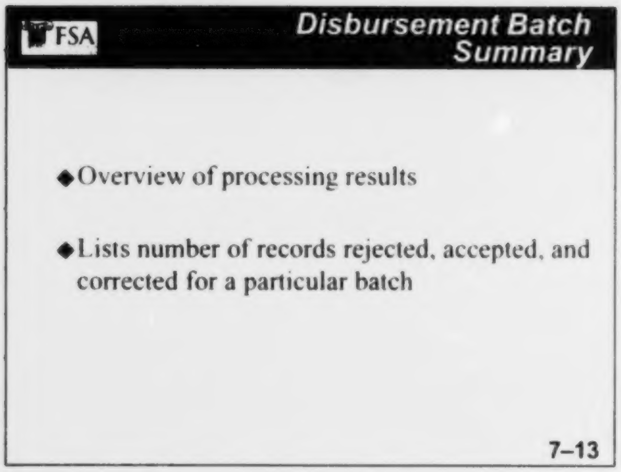
## List—Batch Activity

This report prints a list of all batches that have been imported and exported from EDExpress. For each batch, the report lists the following:

- Batch ID
- Batch Size (number of records in the batch)
- Create Date (when the batch was last imported into EDExpress)
- Confirm Date (when the batch was processed)
- Amount Reported (the sum of award amounts or disbursement amounts)
- Associated Import and Export Files

You must specify the reporting campus ID when printing this report. Also, beginning in 2002–2003, if you do not specify a date range, all batches created will print. If only the From date is specified, all batches created on or after the From date will print; if only the To date is specified, all batches created on or before the To date will print.

You would use this report to look for a particular batch of students' records.



FSA

**Disbursement Batch Summary**

- Overview of processing results
- Lists number of records rejected, accepted, and corrected for a particular batch

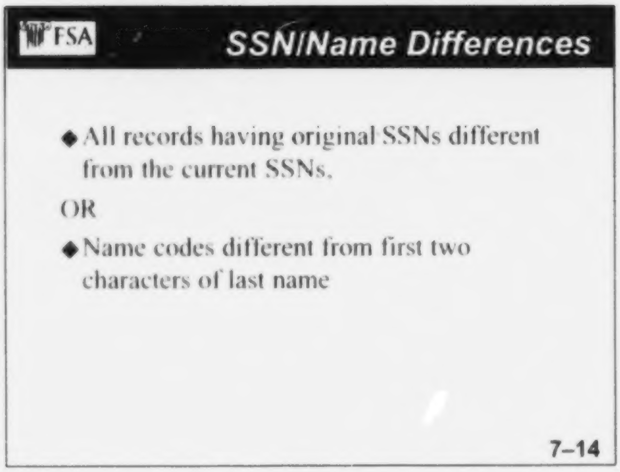
7–13

## Disbursement Batch Summary

This report provides an overview (or summary) of processing results for a specified batch. It shows:

- The number of records that were rejected, accepted, corrected, and duplicated for a particular batch;
- The sum of disbursements submitted and accepted, plus the difference between the two amounts;
- The total amount of payments, including the sum of the disbursement amounts rejected and corrected by the Pell processor; and
- The frequency of each edit/comment code.

If your school's authorization level is different than what you thought it would be, you can compare this report with the ESOA. Also, the frequency of edit/comment codes can help you identify trends in processing.



FSA

### SSN/Name Differences

- ◆ All records having original SSNs different from the current SSNs.

OR

- ◆ Name codes different from first two characters of last name

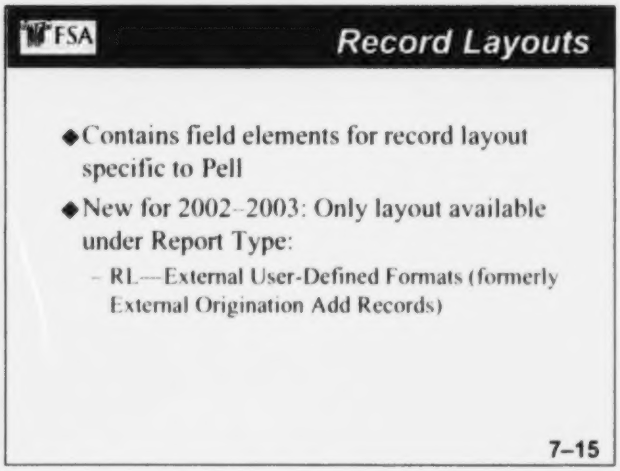
7–14

## SSN/Name Differences

This report lists all records having either:

- Original SSNs that are different from the current SSNs, or
- Name codes that are different from the first two characters of the last name.

You would use this report to identify students who have had name changes (due to marriage, for example) or to identify an error in SSN entry.



FSA **Record Layouts**

- Contains field elements for record layout specific to Pell
- New for 2002–2003: Only layout available under Report Type:
  - RL—External User-Defined Formats (formerly External Origination Add Records)

7–15

## RL—External User-Defined Formats

This report lists all of the field elements for the record layout specific to the Federal Pell Grant Program.

This year, the only record layout available for printing under Report Type is RL—External User-Defined Formats, which was formerly called External Origination Add Records. When printing this report, you must supply the format code; use the ellipsis (...) button to choose from a list of pre-defined codes.

You can use this to create a custom report using any of the data fields in the record layout.

# Individual Learning Activity: #1

## Instructions

Review the four preprinted reports found on the following six pages and answer the following questions.

1. How many students on your database have a difference between their original SSN and current SSN? ____________________

   Have the origination records for these students been accepted by the Pell processor yet?

   ____________________________________________

   Which report did you use to find your answers? ____________________

2. How many students appear to have a concurrent enrollment problem? ____________________

   What is the three-digit edit code for a potential concurrent enrollment? ____________________

   Which report did you use to find your answer? ____________________

3. What is the name of one of your students who has a concurrent enrollment problem?

   ____________________________________________

   Which report did you use to find your answer? ____________________

   Has the Pell processor accepted disbursement amounts for this student that equal the Award Amount for the Entire Year? ____________________

   Which report did you use to find your answer? ____________________

4. Is the sum of reported disbursed amounts equal to the sum of accepted disbursed amounts for the batch that you created on September 3, 2002?

   ____________________________________________

   On what date was this batch processed? ____________________

   Which report did you use to find your answer? ____________________

5. What is the total dollar amount of remaining disbursements to be created? ____________________

   Which report did you use to find your answer? ____________________

```
Report Date: 03/11/2002   U.S. DEPARTMENT OF EDUCATION                  PAGE:  1
Report Time:    14:31:27 2002-2003 FEDERAL PELL GRANT PROGRAM
                          List - Disbursements Pending
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************
Reporting Campus ID      099999     Name EDE UNIVERSITY
Attended Campus ID       099999     Name EDE UNIVERSITY

STUDENT'S NAME                      AWARD    TOTAL DISBURSEMENT  REMAINING DISB
ORIGINATION ID                      AMOUNT    AMOUNT CREATED     TO BE CREATED
--------------------------------  --------  ------------------  --------------
BORTON, WENDELL J.                $3550.00            $1775.00        $1775.00
126815096ST200309999900

SIMPSON, HOMER A.                 $2750.00               $0.00        $2750.00
163424490SI200309999900

SKINNER, SEYMOUR K.               $4000.00               $0.00           $0.00
194740951SK200309999900

TURNER, BENJAMIN P.               $2050.00            $1025.00        $1025.00
199815941TU200309999900

LUNCHLADY, DORIS M.               $4000.00            $2000.00        $2000.00
329292736LU200309999900

DUNKIN, FURIOUS S.                $2450.00            $1225.00        $1225.00
372036353DU200309999900

HAGSTROM, JANEY                   $2250.00            $1125.00        $1125.00
601760605HA200309999900

WHITNEY, ALEX A.                  $3650.00            $1825.00        $1825.00
603507033WH200309999900


ATTENDED CAMPUS TOTALS
```

```
Total Award Amount:                                 $ 24,700.00

  Total Submitted Disbursement Amount:              $  8,975.00
  Total Accepted Disbursement Amount:               $  8,975.00

Total Disbursement Amount Created:                  $  8,975.00

Total Remaining Disbursement To Be Created:         $ 15,725.00

Total Disbursement Records Pending:                           8


GRAND TOTALS
Grand Total Award Amount:                                $ 24,700.00

  Grand Total Submitted Disbursement Amount:             $  8,975.00
  Grand Total Accepted Disbursement Amount:              $  8,975.00

Grand Total Disbursement Amount Created:                 $  8,975.00

Grand Total Remaining Disbursement To Be Created:        $ 15,725.00

Grand Total Disbursement Records Pending:                          8
```

```
 Report Date: 03/11/2002   U.S. DEPARTMENT OF EDUCATION               PAGE:  1
Report Time:    14:34:13 2002-2003 FEDERAL PELL GRANT PROGRAM
                               Disbursement Batch Summary
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
******************************************************************************

Reporting Campus ID       099999
Reporting Campus Name     EDE UNIVERSITY
Batch ID                  #D200309999920020903071421

This report resulted from your batch dated       09/03/2002
We processed your batch on                       09/04/2002
You posted this batch to your database on        09/05/2002

1. INFORMATION ABOUT YOUR STUDENT RECORDS
   A. (E)Rejected - records not retained by Pell                            0
   B. (C)orrected - one or more fields corrected by Pell                    0
   C. (A)ccepted - all fields accepted                                     14
   D. (D)uplicate - duplicate record                                        0
   E. Total processed student records (sum of A through D)                 14

2. INFORMATION ABOUT YOUR STUDENT PAYMENTS
   A. Reported Disbursed Amount                                    $21,450.00
   B. Accepted Disbursed Amount                                    $21,450.00
   C. Difference between A and B                                        $0.00+

INFORMATION FOR RECONCILIATION OF THIS BATCH
3. Total payments (Disbursed Amount for records in batch)         $21,450.00
4. Adjustments made for:
   A. Records we rejected (counted in 1A)                               $0.00-
   B. Records we corrected (counted in 1B)                              $0.00+
5. Total adjustments we made (sum of 4A through 4B)                     $0.00+
6. Net Amount of payments accepted by us as a result of
   this batch (net result between 3 and 5)                         $21,450.00+
Report Date: 03/11/2002   U.S. DEPARTMENT OF EDUCATION          PAGE:  2
Report Time:    14:34:13 2002-2003 FEDERAL PELL GRANT PROGRAM
                              Disbursement Batch Summary
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
******************************************************************************

Reporting Campus ID       099999
Reporting Campus Name     EDE UNIVERSITY
Batch ID                  #D200309999920020903071421

EDIT/COMMENT FREQUENCIES

410 Potential Concurrent Enrollment - Multiple Reporting.  Sent separ        2
    ately.


               TOTAL NUMBER OF EDIT/COMMENT MESSAGES                         2

TOTAL NUMBER OF EDIT/COMMENT MESSAGES WILL EXCEED TOTAL RECORDS IN
THIS BATCH WHEN MULTIPLE ERRORS/ASSUMPTIONS APPLY TO A STUDENT'S DATA.
```

```
Report Date: 03/11/2002        U.S. DEPARTMENT OF EDUCATION             PAGE:  1
Report Time:    14:38:39     2002-2003 FEDERAL PELL GRANT PROGRAM
                                SSN/Name Differences
THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
***************************************************************************
Reporting Campus ID      099999     Name EDE UNIVERSITY
Attended Campus ID       099999     Name EDE UNIVERSITY

                     TRANS                                     CURRENT      ORIG
STUDENT NAME           #   ORGINATION ID               EFC     SSN          STAT
------------------ ----- ----------------------- ------ ----------- ----

BORTON WENDELL J     03  126815096ST200309999900    446* 126-82-5096   R

SKINNER SEYMOUR K    03  194740951SK200309999900      0* 184-74-0951   N

WIGGUM RALPH         03  215596471RI200309999900      0  215-59-6471   A

Total Records:        3
```

```
Report Date: 03/11/2002        U.S. DEPARTMENT OF EDUCATION           PAGE:  1
Report Time:  14:36:17      2002-2003 FEDERAL PELL GRANT PROGRAM
                          Edits/Comments by Student - Disbursement
     THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
******************************************************************************
PELL STUDENT INFORMATION
Name                    BORTON, WENDELL J.  Reporting Campus ID             099999
Original SSN                     126815096  EDE UNIVERSITY                     .
Current SSN                      126825096  Attended Campus ID              099999
Transaction#  03           Name Code  ST    EDE UNIVERSITY

Scheduled Pell Grant Award       $3550  Total Payment Ceiling             $3550

EFC                                446
SEC. EFC CODE

------------------------------------------------------------------------------

EDITS/COMMENTS
Disbursement Reference Number 01
410  Potential Concurrent Enrollment - Multiple Reporting.  Sent separately.

TOTAL NUMBER OF EDITS/COMMENTS              1
```

# Individual Learning Activity: #2

## Scenario

Your supervisor sends you an e-mail asking for information about students who may have received Pell Grant payments at other schools and are in a potential overpayment situation.

## Instructions

Develop a query to identify Potential Overpayment Project (POP) records. Use the query to run reports to answer the questions below.

Hint:

- Use "Disbursement Comments" as your field when developing the query.
- Use Appendix C to identify the edit code (i.e., Disbursement Comment) associated with POP.

## Discussion

1. How many students are in an overpayment situation? ________________
2. What are their names? ________________
3. Did the POP occur on the first or second disbursement record? ________________
4. Did the processor accept all disbursement records for all the students? ________________
5. What is the sum of disbursements in question to these students? ________________
6. When were the origination records for these students processed? ________________
7. What query did you develop to identify the students who had received the POP edit code?

   ________________

8. What reports did you print to get the answers to Questions 1 through 6 above?

   ________________

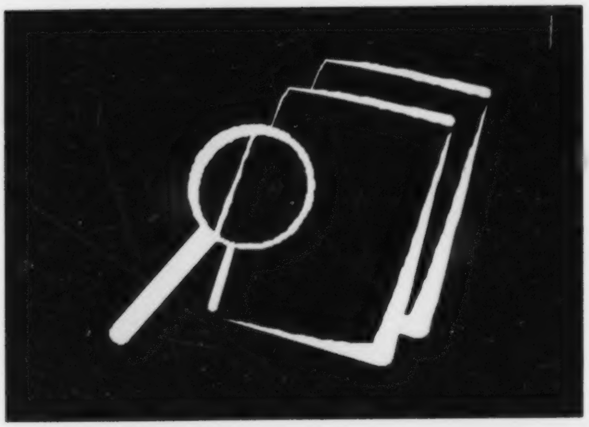
   ________________

   ________________

9. What is the name of the file that the school received informing them of the school who also made Pell Grant payments to these students? ________________
10. What is the name of the school? ________________
11. How many days after receiving the file from the Pell processor does the school have to collaborate with the other school and reconcile the discrepancy? ________________
12. What will happen if the two schools do not reconcile the discrepancy?

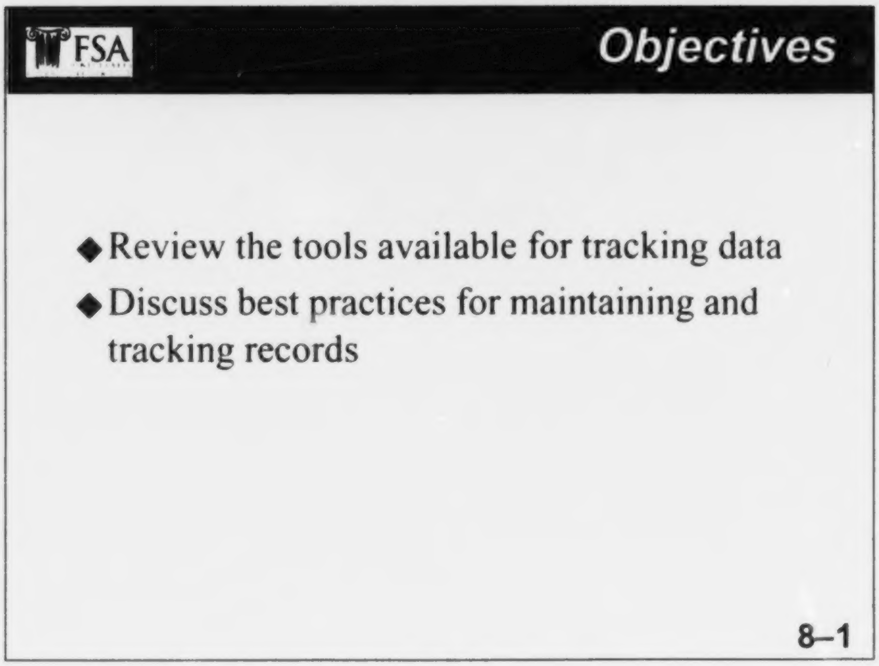
    ________________

    ________________



# *Methods for Maintaining and Tracking Records*

# Session 8: Methods for Maintaining and Tracking Records



## Objectives

- Review the tools available for tracking data
- Discuss best practices for maintaining and tracking records

# Key Terms

## Batch Activity Log

Every time you export or import data from EDExpress, EDExpress records an entry in the Batch Activity database. You can also print a Batch Activity List. You can access the Batch Activity database by clicking Tools, Browse, and Pell on the EDExpress menu bar.

## Origination Status

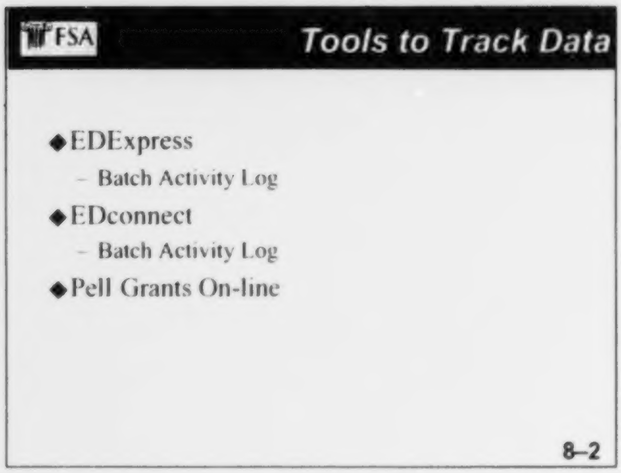
Indicates the current status of the origination record. Valid entries include:

| | |
|---|---|
| A | Accepted |
| B | Batched |
| E | Rejected |
| N | Not Ready |
| R | Ready |

## Pell Action Status

Formerly RFMS Status, this is the code designating the result of the Pell processor for the student record. One of the following codes is displayed in this field:

| | |
|---|---|
| A | Accepted |
| C | Corrected |
| D | Duplicate |
| E | Rejected |



FSA

**Tools to Track Data**

- EDExpress
  - Batch Activity Log
- EDconnect
  - Batch Activity Log
- Pell Grants On-line

8–2

# Tools to Track Data

Managing your data is the most important component of the Pell process. You need to know where your data is stored, when you transmitted a batch, and when you receive data from the processor. EDExpress, EDconnect, and Pell Grants On-line have excellent features that allow you to keep close track of the status of your records and data files.

## EDExpress

The Batch Activity Log keeps track of every file that has been imported and exported. Browse this database by selecting Tools/Browse/Pell, and then clicking on the Batch Activity tab. One row of information displays for each batch that has been created. The rows are sorted alphabetically by Batch ID. As we saw in Session 7, you can also print the List—Batch Activity Report to review the status of your batches.

## EDconnect

EDconnect, the software used to transmit files to the network, also has a Batch Activity Log. Browse this database to track the status of files that have been sent and received from the SAIG.

## Pell Grants On-Line

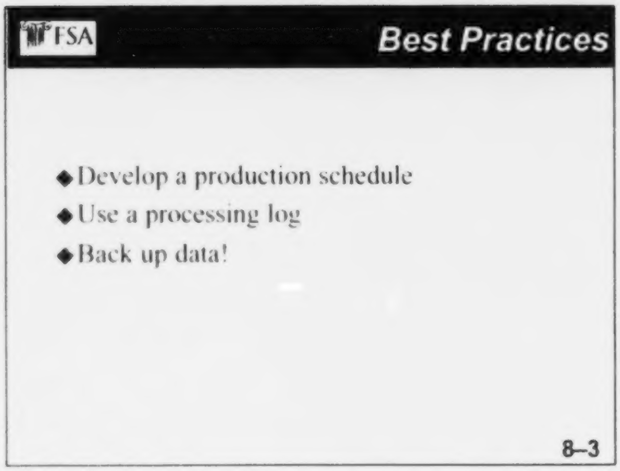
Finally, refer to Pell Grants On-Line to determine whether batches have been received and processed by the Pell system. As we learned in Session 2, the URL is: https://www.pellgrantsonline.ed.gov.

From the home page, select Batches from the menu, and then Retrieve Batch Status. Enter the school's Pell ID, select the Award Year, select the Batch Type, and click the Submit button to obtain the processing status of any batch for a specific Award Year.

On the following page, we provide a chart showing how you might use the three tools—EDExpress, EDconnect, and Pell Grants On-line—to answer questions about the status of an origination record during each step of the process.

# Tracking the Status of an Origination Record

| Step in Process | Question | Action | Comment |
|---|---|---|---|
| **Data Entry** | Has the origination record been entered? | Print the Origination List | If the record is listed, it has been entered |
| | Has record been exported? | | If the Origination Status is:<br>A (Accepted),<br>B (Batched), or<br>E (Rejected), then it has been exported. |
| **Export** | What is the record's Batch ID? | Print the Origination Record Report | |
| | When was the batch exported? | Browse the EDExpress Batch Activity database | The export date displays in the column titled: Date Batch |
| | What is the filename created? | | Refer to the column titled: Export Filename |
| **Transmit** | Was the batch transmitted to the SAIG? | Browse the EDconnect Activity Log | |
| | When was the batch transmitted? | | |
| **Process** | Was the batch processed? | Review Pell Grants On-Line | www.pellgrantsonline.ed.gov |
| | When was the batch transmitted? | | |
| **Receive** | Was the acknowledgement file received from the SAIG? | Browse the EDconnect Activity Log | |
| | When was the file transmitted? | | |
| | What is the name of the file? | | |
| **Import** | Was the acknowledgement imported? | Browse the EDExpress Batch Activity database | If the Update Date is present, the file was imported |
| | When was the file imported? | | Refer to the column titled: Update Date |
| | Did the Pell processor accept the record? | Print the Origination Record Report | Review the Pell Action Status |



FSA

**Best Practices**

- ◆Develop a production schedule
- ◆Use a processing log
- ◆Back up data!

8–3

## Production Schedule

The first step to good data management is creating a production schedule. Your goal is to successfully track a record from entry through receipt and processing. Having a defined schedule assures that batches or records are not misplaced and cycles are completed.

We have provided an example of a processing schedule on the following page. Adapt it for your own use. The frequency with which you complete certain activities will vary from school to school. Some schools will want to submit records once per week. Others will find it necessary to submit records at least once per day.

## Processing Log

While EDExpress, EDconnect, and Pell Grants On-Line provides excellent information about the status of batches, we recommend that you develop your own processing log that ties the three tools together. An example of a processing log is provided following the processing schedule example. After each processing step is completed, you would enter the date, plus the Batch ID # and filename.

## Backing Up Data

Have you thought about what might happen if your PC's hard drive crashed? To ensure against this catastrophe, you should create a procedure and a routine schedule for backing up your EDExpress database. How often you back up your database is determined by how much work you are willing to re-create in a given amount of time. Some large schools back up their data two times a day because they are unwilling to lose more than a half day's work to a system failure.

## Sample Weekly Processing Schedule - Pell Grants

| | Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|---|
| Morning | • Import ISIRs from CPS<br>• Import ISIRs from App Express | • Import ISIRs from CPS<br>• Import origination acknowledgements<br>• Import disbursement acknowledgements<br>• Import MRRs<br>• Import ISIRs from App Express | • Import ISIRs from CPS<br>• Import ISIRs from App Express | • Import ISIRs from CPS<br>• Import ISIRs from App Express | • Import ISIRs from CPS<br>• Import origination acknowledgements<br>• Import disbursement acknowledgements<br>• Import MRRs<br>• Import ISIRs from App Express |
| Afternoon | • Export origination record<br>• Export disbursement records<br>• Back up system | • Back-up system | • Back up system | • Export origination record<br>• Export disbursement records<br>• Back up system | • Back up system |
| All Day | • Review, enter, and update origination records<br>• Review, enter, and update disbursement records | • Review, enter, and update origination records<br>• Review, enter, and update disbursement records | • Review, enter, and update origination records<br>• Review, enter, and update disbursement records | • Review, enter, and update origination records<br>• Review, enter, and update disbursement records | • Review, enter, and update origination records<br>• Review, enter, and update disbursement records |

# Sample Processing Log—Pell Grants

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| **EDExpress** | **EDconnect** | **Pell Grants On-line** | **EDconnect** | **EDExpress** |
| • **Batch ID#**<br>• **Export File Name**<br>• **Date** | **File Transmitted Date** | **File Processed Date** | • **Received File Name**<br>• **Date** | **File Import Date** |
| #D20030999920020903071421<br>C:\IAM\DATA\PGDR03IN.DAT<br>09/03/2002 | 09/04/2002 | 09/04/2002 | C:\IAM\DATA\PGDR03OP.DAT<br>09/05/2002 | 09/05/2002 |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Group Discussion

1. What methods do you use at your school to track the status of your records through the process?

   ____________________________________________

   ____________________________________________

   ____________________________________________

   ____________________________________________

2. Are you satisfied with the method that you use? Why or why not?

   ____________________________________________

   ____________________________________________

3. What process do you have in place to back up your database?

   ____________________________________________

   ____________________________________________

# Individual Learning Activity

## Instructions

Answer the following questions using the tools available in EDExpress to track the status of records and batches.

## Discussion

1. Has Seymour Skinner's origination record been exported? ______________________________

2. Was Lillian Price's origination record accepted by the Pell processor? ____________________

3. When was Lillian Price's origination batch processed by the Pell system? ________________

4. When was Lillian Price's origination batch imported into EDExpress? __________________

5. How many records were accepted or corrected in Lillian Price's origination batch? __________

6. When was the MRR batch imported? ______________________________________________

7. Three batches of disbursement records have been exported from EDExpress. Have acknowledgement records been imported for all three batches? _________________________

8. One batch of disbursement records was transmitted with one record having a negative disbursement amount.

   What was the name of the export filename? ________________________________________

   What is the name of the student whose record was transmitted in this batch?

   ________________________________________________________________________________

# *Appendix A*

# *Glossary*

# Glossary

## Academic Year

A measure of academic work to be accomplished by a student.

A school defines its own academic year. However, federal statute and regulations set minimum standards to determine federal financial aid awards. For instance, the academic year must be at least 30 weeks of instructional time in which a full-time student is expected to complete at least 24 semester or trimester credit hours, 36 quarter credit hours, or 900 clock hours.

## Advanced Funding Method

Under the Advanced Funding Method, a school receives an initial authorization amount from which it may draw down funds from the Grants Administration Payment System (GAPS).

The Pell processing system adjusts the school's initial authorization amount during the award year based on the receipt and acceptance of disbursement records transmitted by the school.

## Attended Campus

For independent campuses, this is the same as your Reporting Campus.

For central administrative campuses and offices reporting for branch campuses with a unique Pell ID, this is the campus the student actually attends.

## Award Year

The award year begins on July 1 of one year and continues through June 30 of the next year.

Funding for Federal Pell Grants and campus-based programs is provided on the basis of the award year. For example, a student is paid from funds designated for a particular award year, such as the 2002–2003 award year. The award year may be different than the school year.

## Batch

A group of records gathered in one file for processing.

## Batch IDs

Batch IDs are a means of tracking a group of students' records. They are 23 characters long and are generated by EDExpress when a school batches a group of records. The batch ID is unique to that batch and its format is specified.

# Glossary

## COA

Cost of Attendance (COA) is determined by the school, within the guidelines established by federal statute. The student's EFC is subtracted from the COA to determine the student's need for aid.

A student's COA includes tuition and fees; room and board expenses while attending school; and allowances for books and supplies, transportation, loan fees (if applicable), dependent care costs, costs related to a disability, and other miscellaneous expenses. In addition, reasonable costs for a study-abroad program, costs associated with a student's employment as part of a cooperative education program, and the cost for purchase or rental of a computer may be included.

For more information about the components used to calculate a student's Pell COA, see Chapter 4 of *The Federal Student Financial Aid Handbook 2002–2003*.

## CPS

The Central Processing System (CPS) is ED's processing facility for FAFSA data.

The CPS receives student information from the application processors, calculates a student's official EFC, performs several eligibility database matches, prints the SAR, and sends it to the student. It also produces ISIRs and sends them to the schools the student indicated on the FAFSA.

## Current SSN

Current SSN is the SSN as reported by the student to the CPS as of this transaction number.

If the student has changed the SSN through the CPS, the original SSN in the student ID will not match the current SSN.

## Destination Point

Destination point is the receiver and transmitter of Title IV data. It interfaces with the SAIG. A destination point can be a postsecondary school servicing one or more schools or a service agent servicing multiple schools.

## Dialog Box

Dialog boxes appear on the screen to display or request information and prompt you to respond.

## Disbursement Batch Summary Report

This report provides an overview of processing results and details the number of records that are rejects, corrections, duplicates, and accepted for the disbursement batch. The report also tallies the frequency of each edit/comment code.

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# Glossary

## Disbursement List Report

This report prints a list of disbursement records based on the criteria you specify in the Print dialog box. If no criteria are specified, then all disbursement records in your school's Pell database print on this report.

## Disbursement Schedule

Disbursement schedule is a spreadsheet schedule defining the student's scheduled Federal Pell Grant Payment amount as a result of COA and EFC.

## DRN

DRN is the four-digit Data Release Number printed on the student's paper SAR.

If the student did not list your school on the paper FAFSA application, you may use the DRN to add your school to the ISIR after receiving the student's permission to receive the ISIR data.

## ED

ED is an acronym for the U.S. Department of Education.

## EDExpress

EDExpress is a software package created and provided free of charge to schools by ED. EDExpress is used to enter, manage, and report Title IV student financial aid data.

## Edits/Comments by Student Origination/Disbursement Report

This report details the edits and comments applied by the Federal Pell Grant processor for a single student's (Single) or a group of students' (Multiple) processed Pell payment data. Only corrected or rejected records will have edits/comments. New for 2002–2003: the Pell comment text for reject edits by student appears at the bottom of this report.

## EFC

Expected Family Contribution (EFC) is the amount, determined by a formula Congress established, that a student's family is expected to contribute toward the COA. It is determined for the purposes of the federal SFA programs. The nine-month EFC is the EFC used for the Federal Pell Grant Program.

The EFC is printed on the first page of the SAR or ISIR.

# Glossary

## Eligible Applicant File

A file sent to the Pell processing system from the CPS that lists all the Pell-eligible ISIR/SAR student IDs.

If a record is rejected/not retained (for instance, if the Original SSN is invalid), the record is not found in the eligible applicant file. Schools send origination records to the Pell processing system to confirm the student's Pell eligibility.

## Enrollment Date

This is the date classes begin for the student's program in the 2002–2003 school year. The date cannot be earlier than 070102 (July 2002) unless the student's program overlaps two Federal Pell Grant award years, as with summer school students.

If the student is expected to complete a payment period within the 2002–2003 award year that overlaps another award year, this date is the first month of classes that will be paid from the 2002–2003 award year.

## ESOA

The Electronic Statement of Account (ESOA) is a summary of a school's Pell Grant award year account produced when authorization level changes.

ED produces an ESOA whenever the Federal Pell Grant Program adjusts the school's current Federal Pell Grant authorization. Just In Time (JIT) schools receive an ESOA after each processed batch of Pell disbursement records. Advanced Funded schools receive an ESOA at the beginning of the award year.

Since the processing of a batch does not necessarily result in a change to a school's current Federal Pell Grant authorization, Advanced Funded schools receive an ESOA only when a batch exceeds the initial current authorization level.

## ESOA Import Report

This report details the record layout for the Electronic Statement of Account (ESOA) import.

## ESOA Report

The ESOA (Electronic Statement of Account) report details your school's Pell Grant spending authorization and the amount expended (the total amount submitted on Pell recipient records) to date.

## Export

The EDExpress export function creates a batch of data records that are ready to be sent to the Pell processor or an external system. The FAA must transmit the batch using the EDconnect software.

# Glossary

## FAA

The Financial Aid Administrator (FAA) is officially responsible for the accuracy and completeness of all data and awards submitted to the Federal Pell Grant Program.

## FAFSA

An acronym for Free Application for Federal Student Aid, FAFSA is an application that is filled out and filed by a student seeking financial aid for college. It records household and financial information that is then used by the CPS to calculate the EFC.

The types of FAFSA include:

- On the Web
- EDExpress
- Electronic application
- Paper FAFSA
- Renewal FAFSA on the Web
- Paper Renewal FAFSA

## Hours/Credits in Program Academic Year

This is the total number of clock hours or credit hours in the academic year definition for the program of study in which the student is enrolled. Provide this information if the school measures academic progress by clock hours or credit hours, but does not have terms.

## Import

The Import function places files from batches transmitted to you by the Federal Pell Grant Program into the EDExpress database.

## Incarcerated

Students incarcerated in federal or state penal schools are not eligible to receive Federal Pell Grants. This includes penal schools of jurisdictions, such as the District of Columbia, defined as a state in the HEA.

## ISIR

The Institutional Student Information Record (ISIR) is an electronic federal output record that contains the student's EFC as calculated by the CPS and all the financial and other data submitted by the student on the FAFSA.

Schools that participate in the EDE system can receive the ISIR electronically, if the student has authorized the school to receive the data.

# Glossary

An EFC does not necessarily indicate the student is eligible to participate in the Federal Pell Grant Program. The Federal Pell Grant Program serves undergraduate students only. If the student's application indicates the student has a bachelor's degree or is enrolled in a graduate/professional program, the student is ineligible for a Pell award.

## *List—Batch Activity Report*

This report prints an activity log of all batches created in the Pell module.

## *List—Disbursements Pending Report*

New for 2002–2003: List—Disbursements Pending report displays a list of students whose Total Disbursement Amount is less than their Origination Award Amount. The report provides summary data, including totals per attended campus and grand totals for all campuses.

## *List—Processed Disbursements Year-to-Date Report*

This report prints a listing of the totals for all accepted or corrected disbursement records in the database. Dollars and cents print for all amounts on this report.

## *Name Code*

The name code is the original first two characters of the student's last name as processed by the Application Processing System.

For example, for the student "O'Boy, Virginia E.," the first two characters are "O' " and are the first two characters in the name code.

## *Original SSN*

The Original SSN is the first Social Security number (SSN) reported by the student that was processed through the Central Processing System for this award year. This number must be entered when creating a new Pell Payment data record.

If the student or the Central Processing System made an error in entering this number, and the student makes a correction, the student's Current SSN changes, but the Original SSN remains the same.

If the student makes an error and shares an Original SSN with another student also seeking a Pell Grant award, the error must be corrected by the other student via a Correction Application. The original student should also refile the FAFSA using the correct SSN.

# Glossary

## Origination ID

The key to the Pell data record is the Pell Origination ID. The system assigns each new Pell record a Pell Origination ID when the Attended Campus ID Code is established by the user.

The Pell Origination ID consists of the following:

| Data Element | Length | Description |
|---|---|---|
| SSN | 9 | The Original Social Security Number from the Demo tab |
| Name Code | 2 | The name code of the current Pell record (typically the first two letters of the student's last name) |
| Year Indicator | 4 | The current award year cycle |
| Attended Campus ID Code | 6 | The valid Attended Campus ID Code as defined in your School setup dialog box |
| Origination Sequence Number | 2 | The number of Pell data records for this SSN for this Attended Campus ID and award cycle |

## Origination List Report

This report prints a list of origination records based on the criteria you specify in the Print dialog box. If no criteria are specified, then all the records in your school's Pell database print on this report.

## Origination Record

The Origination Record is used to report to the Pell processor that the school intends to make a Pell Grant payment to a particular student.

## Packaging Module

Packaging is an EDExpress component that allows you to create award packages, maintain established fund balances, create award letters, and create data for FISAP reporting.

## Payment Methodology

Payment methodology is the method of calculation used to determine a student's award, established in the final Federal Pell Grant Program regulations published November 1, 1994.

The five methods are:

1 Standard-term, credit-hour program in which weeks in the program's academic year is greater

| | |
|---|---|
| | than 30 weeks |
| 2 | Standard-term, credit-hour program in which the weeks in the program's academic year is less than 30 weeks |
| 3 | Any term-based, credit-hour program |
| 4 | Clock-hour programs and credit-hour programs without terms |
| 5 | Programs offered by correspondence |

## Pell Module

The EDExpress Pell module is used to report student data and disburse and keep track of Pell awards in the Pell processing system. Serving the recipients of grants from the Pell Grant Program, the Pell processing system contains data on Pell Grant recipients and manages the disbursement and accounting of Pell Grant funds to schools. The Pell processing system collects both Pell origination and Pell disbursement records for students who are Pell eligible.

## Pell Origination Record Report

This report will print any record in Pell. You may opt to print out edits/comments and/or disbursement information by clicking the appropriate option in the Print dialog box.

## Pell Processing System

The Pell processing system is a Title IV automated system that supports the operational mission of the Federal Pell Grant Program. Serving the recipients of grants from the Pell Grant Program, the Pell processing system contains data on Pell Grant recipients and manages the disbursement and accounting of Pell Grant funds to schools. The Pell processing system collects both Pell origination and Pell disbursement records for students who are Pell eligible.

## Processed Edits/Comment Codes

These codes communicate unique messages from the Pell processing system when the school's reported student payment data is found to be in error or inconsistent with related data.

## Processing Cycle

Corresponds to a specific award year and refers to the time period during which the Federal Pell Grant Program accepts data. In the 2002–2003 Pell Grant award year, the processing cycle is July 1, 2002–September 30, 2003.

# Glossary

## Reported Date Enrolled

Reported Date Enrolled is the first date the student was enrolled, as reported by the school (see Date Enrolled This Award Year).

## Reporting Campus

Reporting campus is the six-digit Pell ID for a participating independent campus or central administrative campus/office for branch campuses that have unique Pell IDs. The Reporting Campus is the funded school.

## SAIG

The SAIG, or Student Aid Internet Gateway, links thousands of network nodes, or destination points, across the United States, its territories, and certain ED-designated foreign countries to the ED's Title IV Student Financial Aid Programs and delivery system.

Destination points communicate with the SAIG using a PC or mainframe computer to transmit and receive data. Destination points are postsecondary schools, Loan Origination Centers, guaranty agencies, lenders, ED headquarters and regional office personnel, ED Title IV Applications System contractors, state scholarship and financial aid organizations, other federal agencies, and ED-designated entities.

## SAR

The Student Aid Report (SAR) is a federal output document sent to a student by the application processor. The SAR contains financial and other information reported by the student on the FAFSA. The information is entered into the Central Processing System (CPS), where edits and calculations are performed and the SAR is produced.

## SAR Information Acknowledgement

A noncorrectable one-page SAR composed of student information only, it is sent to students who transmit electronic applications or corrections through their schools or the Web.

## Scheduled Federal Pell Grant

The Scheduled Federal Pell Grant is the maximum amount that can be paid to a full-time student for a full academic year within this Pell Grant award year based upon the student's EFC and COA.

See Federal Pell Grant Program Regular Payment Schedule for Determining Full-Time Awards for the 2002–2003 award year amounts.

## School Origination/Disbursement Cross-Reference

This can be any cross-reference information useful to identify student records internally at your campus. This field is available on both the **Origination** and **Disbursement** tabs.

# Glossary

## School Type

School Type is a code describing the length of the majority of programs at the school. Use the code that best describes your school. This number can range from one to six.

| | |
|---|---|
| 1 | Less than one year |
| 2 | One year but less than two years |
| 3 | Two years but less than three years |
| 4 | Three years but less than four years |
| 5 | Four years (baccalaureate degree only) |
| 6 | Five years or more |

Schools that cannot be described by one of these codes should leave this field blank.

## School Year

The School Year is the school's academic year. The school year may be different than the Federal Pell Grant Program Award Year.

## Secondary EFC Used Code

A code indicating the EFC on which the school based the student's Federal Pell Grant award.

The acceptable values are:

| | |
|---|---|
| O | Award previously based on secondary EFC |
| S | Award based on secondary EFC |
| Blank | Primary EFC used in calculating award |

If the student's award data in the Pell processing system is updated to show a change in the award calculated when using the secondary EFC, but the student doesn't have a secondary EFC, the data is rejected.

To show that student's data has been changed to the updated amount, the FAA must report **S** (Secondary EFC used in calculating award) or the data will continue to be rejected.

# Glossary

## SSN/Name Differences* Report

This report lists all records with discrepancies in SSN, DOB or Last or First name between your origination file and the Pell processor updated by the CPS Pell Eligible File. This report does not update EDExpress upon import.

## Total Payment Ceiling

The maximum available award a student may receive during a full academic year for a given enrollment status, EFC, and COA. This amount is also based on the payment methodology and eligibility used.

## Transaction Number

The Transaction Number is the two-digit number that identifies a student's transaction. The student's SSN, name code, and transaction number used together form the student's ID.

If you would like to change the transaction number, click the ellipsis (...) button. This displays a grid of all Pell-eligible ISIRs on your database for the student. When you select a transaction, EDExpress automatically enters the associated EFC, Secondary EFC, and Verification Status values on the origination record.

## Weeks in Program Academic Year

The number of weeks of instruction in the school's academic year. Must be non-blank with Payment Methodologies 2, 3, 4, or 5.

| | |
|---|---|
| Blank | Schools using payment methodology 1 |
| 30–78 | All other payment methodologies |

If a school's Academic Year is less than 30 weeks, you must report 30 due to Federal Pell Grant Program minimum requirements. If a school's academic year is greater than 30 weeks, report the actual number of weeks required.

## Weeks Used to Calculate Payment

The total number of weeks of instruction in the student's program of study's Academic Year.

| | |
|---|---|
| Blank | Payment methodology 1 |
| 00–29 | Payment methodology 2 |
| 00–78 | All other payment methodologies |

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# Appendix B

# Pell Message Classes

# Pell Message Classes

| Message Class | Sent or Received by School | Batch ID | Data Type | Record Length |
|---|---|---|---|---|
| PGOR03IN | Sent | #O | Origination Records | 300 |
| PGOA03OP | Received | #O | Origination Acknowledgement Records | 450 |
| PGOP03OP | Received | #P | Origination Acknowledgement Records from the Web | 450 |
| PGDR03IN | Sent | #D | Disbursement Records | 100 |
| PGDA03OP | Received | #D | Disbursement Acknowledgement Records | 200 |
| PGDW03OP | Received | #W | Disbursement Acknowledgement Records from the Web | 200 |
| PGAS03OP | Received | #A | Statement of Account Records | 200 |
| PGRQ03IN | Sent | #R | Data Request Records | 125 |
| PGRA03OP | Received | #R | Data Request Acknowledgement | 150 |
| PGMR03OP | Received | #M | Multiple Reporting Records | 450 |
| PGRC03OP | Received | #C | Reconciliation Records | 112 |
| PGYR03OP | Received | #Y | Year to Date Records | 350 |
| PGTX03OP | Received | #T | ED Comments in ASCII Text Format | 80 |
| PGDA03OP | Sent | #G | System Generated Batches | 200 |

# *Appendix C*

# *Edit Codes*

# Edit Codes

## Edit Codes At-A-Glance

The following tables present, at-a-glance:

- Legacy Edit and reject codes for batch edits (see pages C2-3),
- Origination edits (see pages C4-5),
- Disbursement edits (see pages C6-8),
- Data request edits (see pages C9), and
- Pell Grant-COD Edit Conversion Table (see pages C10-22).

An expanded version of the Edit Code Tables that include Edit Codes, What They Mean, How to Fix Them as well as Technical Edit information may be found in Appendix D of the Pell Grant Technical Reference.

When viewing batch and record data on the COD Web page, users will see the COD edit messages not the legacy edit/comment codes sent on the batch acknowledgement. A listing of all the legacy edit/comment codes and a conversion table of the COD edit messages is included here.

## Batches

Edit Code types are: E=Reject, W=Warning, D=Duplicate.

| Edit Code | Message | Type |
|---|---|---|
| 201 | Missing /Mismatched Grant Batch Header. | E |
| 202 | Missing /Mismatched Grant Batch Trailer. | E |
| 203 | Duplicate Grant Batch Header. | E |
| 204 | Reserved for Future Use. | |
| 205 | Reserved for Future Use. | |
| 206 | Data Record Length must be numeric. | E |
| 207 | Reported Number of Records must be numeric. | E |
| 208 | Reported Total of Batch must be numeric. | E |
| 209 | Invalid /Missing Batch Number. | E |
| 210 | Year must be numeric. | E |
| 211 | Pell ID must be numeric. | E |
| 212 | Pell ID invalid or not found. | E |
| 213 | Creation date must be numeric. | E |
| 214 | Creation time invalid. | E |
| 215 | Batch Type Invalid. | E |
| 216 | Grantee DUNS does not match the School's Reporting Pell ID in Batch Number for Award Years prior to 2001-2002. | W |
| 217 | Discrepancy between different records with identical batch number. | E |
| 218 | Reported Number of Records does not equal count of detail records. | W |
| 219 | Total of Batch does not equal computed total of detail record amounts. | W |
| 220 | Reported Sign Indicator must be a valid indicator. | W |
| 221 | Reporting Campus Pell School ID is a branch. | E |
| 222 | School is currently ineligible upon receipt of batch. | W |
| 223 | Reserved for Future Use. | |

## Batches (Continued)

Edit Code types are: E=Reject, W=Warning, D=Duplicate.

| Edit Code | Message | Type |
|---|---|---|
| 224 | Invalid Message Class. | E |
| 225 | Data Record Length is not valid for Message Class. | E |
| 226 | Batch type code in Batch Number must equal record type for message class. | E |
| 227 | Batch Create Date is greater than current system date. | E |
| 228 | Batch Number indicates you have included a batch with data from a different Award Year. | E |
| 229 | Batch submitted prior to system start-up date. | E |
| 230 | Disbursements submitted prior to award year start date. | E |
| 231 | Reporting School must send Special Disbursement for award years prior to 2001 - 2002. | E |
| 232 | No detail records in Batch. | E |
| 233 | Invalid Destination Mailbox ID. | E |
| 234 | Reserved for future use. | N/A |
| 235 | For Award Year 2000-2001 and prior. Blank Output Media Type. Set to Media Type that was received. | W |
| 236 | Trailer Message Class does not match the Header. | E |
| 238 | Trailer Destination Mailbox ID does not match the Header. | E |
| 239 | School is not using the latest release of EDExpress. | W |
| 240 | OPE ID Number does not match the Schools Reporting Pell ID in the Batch Number for Award Years after 2000-2001. | W |

## Originations

Edit Code Types: E-Reject, W-Warning, D-Duplicate

| Edit Code | Message | Type |
|---|---|---|
| 301 | Invalid Origination ID. | E |
| 302 | Duplicate Origination for Award Year 2000-2001 and before. | E |
| 303 | Invalid Original SSN or Name Code resulting in the Pell Processor being unable to match with the Applicant record for Award Year 2001 and before; OR Invalid Original SSN resulting in the Pell Processor being unable to match with the Applicant record for Award Year 2001-2002 and beyond. | E |
| 304 | Attending and Reporting/Funded campus mismatch or Origination Identifier Pell ID mismatch with Attended campus Pell ID. | E |
| 305 | Invalid Award Amount / Correction Applied. | W |
| 306 | Invalid Disbursement Date / Correction Applied. | W |
| 307 | Invalid Enrollment Date / Correction Applied. | W |
| 308 | Invalid low tuition & fees code / Correction Applied. | W |
| 309 | Invalid Verification Code / Correction Applied. | W |
| 310 | Invalid Incarcerated Federal Pell Recipient code / Correction Applied. | W |
| 311 | Invalid Transaction Number. | E |
| 312 | Invalid Expected Family Contribution. | E |
| 313 | Invalid Secondary Expected Family Contribution / Correction Applied. | W |
| 314 | Invalid Academic Calendar / Correction Applied. | W |
| 315 | Invalid Payment Methodology / Correction Applied. | W |
| 316 | Invalid Number of Payment Periods / Correction Applied for Award Year 2002 and before. | W |
| 317 | Invalid Cost Of Attendance / Correction Applied. | W |
| 318 | Invalid Enrollment Status / Correction Applied. | W |
| 319 | Invalid Weeks of Inst. Time in program's definition of Academic Year / Correction Applied. | W |
| 320 | Invalid Weeks of Inst. Time used to calculate payment / Correction Applied. | W |
| 321 | Invalid Credit or Clock hrs in program's definition of academic year / Correction Applied. | W |
| 322 | Invalid Credit or Clock hrs in all payment periods expected to complete this school year / Correction Applied. | W |

## Originations (Continued)

Edit Code Types: E-Reject, W-Warning, D-Duplicate

| Edit Code | Message | Type |
|---|---|---|
| 323 | Origination is 'Over Paid' and negative disbursement is expected. | W |
| 324 | Invalid Name Code resulting in the Pell Processor being unable to match with the Applicant record, or does not equal the name code in the Origination ID, for Award Year 2002 and beyond. | E |
| 325 | Invalid Origination ID - Pell ID is non-numeric for Award Year 2002 and beyond. | E |
| 326 | Invalid Origination ID - Invalid Award Year for the Batch for Award Year 2002 and beyond. | E |
| 327 | Invalid Origination ID - Sequence Number is not "00" for Award Year 2002 and beyond. | E |
| 328 | Invalid Origination ID - SSN is non-numeric, or is not >= 001010001 and <= 999999999 for Award Year 2002 and beyond. | E |
| 329 | Invalid Origination ID - Name Code not A-Z or '.' or ''' or '-' , or ' ' for Award Year 2002 and beyond. | E |
| 330 | Duplicate SAR ID may be shared by two students for Award Year 2002 or beyond. | W |
| 331 | Duplicate Origination for Award Year 2002 and beyond. | D |
| 332 | Invalid Reported Current SSN for award year 2003 and beyond | E |
| 333 | Invalid Reported Date of Birth for award year 2003 and beyond | E |
| 334 | Invalid Reported Last Name for award year 2003 and beyond | E |
| 335 | Invalid Reported First Name for award year 2003 and beyond | E |
| 336 | Invalid Reported Middle Initial for award year 2003 and beyond | E |
| 337 | Student Not Pell Eligible for award year 2003 and beyond | E |
| 338 | Duplicate Match on CPS for award year 2003 and beyond | E |
| 339 | Origination Record Reported with Zero Award Amount for award year 2003 and beyond | E |
| 399 | New Origination award or increase received after end of processing year and school has not been granted Administrative Relief. | E |

## Disbursements Edit Codes and Messages

Edit Code Types: E = Reject, W = Warning, D = Duplicate

| Edit Code | Message | Type |
|---|---|---|
| 401 | Invalid Origination ID. | E |
| 402 | Origination ID Does not match. | E |
| 403 | Disbursement Reference Number Already on File. | E |
| 404 | Debit/Credit Indicator Flag Not Valid. | E |
| 405 | Disbursement Amount Not Valid because amount is non-numeric. | E |
| 406 | Disbursement Amount Is Not In Valid range. | W |
| 407 | Disbursement Date is Not Valid Date because date is non-numeric. | E |
| 408 | Disbursement Date is Not Valid for Processing Date, not in valid range, or not in valid date format. | E |
| 409 | Reserve for future use. | E |
| 410 | Potential Concurrent Enrollment – Multiple Reporting. Sent separately. | W |
| 411 | Potential Overaward Project - Multiple Reporting. Sent separately. | W |
| 412 | Negative disbursement cannot be accepted without a previous positive disbursement. | E |
| 413 | Insufficient negative disbursement amount. Negative disbursement is expected for difference amount. | W |
| 414 | Origination is in "Overpaid" status. Positive Disbursement cannot be accepted. | E |
| 415 | School Eligibility Status indicates the school must submit a Special Disbursement record and Award Year is 2000 – 2001 or prior. | E |
| 416 | Negative disbursement adjusted to reflect accepted previous disbursement balance. | W |
| 417 | Disbursement submitted after end of processing year and school has not been granted administrative relief | E |
| 418 | Origination indicates Verification Status 'W', disbursement adjusted to the Origination Award Amount or 50% of the Scheduled Award Amount, whichever is lesser, and Award Year is 2000 – 2001 or prior. | W |

## Disbursements Edit Codes and Messages (Continued)

Edit Code Types: E = Reject, W = Warning, D = Duplicate

| Edit Code | Message | Type |
|---|---|---|
| 419 | Origination indicates Verification Status 'W'. Verification 'W' needs to be updated on the origination record. | W |
| 420 | Origination indicates Verification Status 'W', only one disbursement allowed, and Award Year is not 2001 – 2002 or prior. | E |
| 421 | Disbursement generated after Verification Deadline Date and Award Year is 2000 – 2001 or prior. | E |
| 422 | School is eligible, Payment Period Start Date is invalid or not in a valid range and Award Year is 2001 – 2002 or beyond. | W |
| 423 | School is not eligible, Payment Period Start Date is invalid or not in a valid range and Award Year is 2001 – 2002 or beyond. | E |
| 424 | School is not eligible, Payment Period Start Date is not in the eligible range and Award Year is 2001 – 2002 or beyond. | E |
| 425 | Invalid Origination ID - Pell ID is non-numeric for Award Year 2002 and beyond. | E |
| 426 | Invalid Origination ID - Invalid Award Year for the Batch for Award Year 2002 and beyond. | E |
| 427 | Invalid Origination ID - Sequence Number is not "00" for Award Year 2002 and beyond. | E |
| 428 | Invalid Origination ID - SSN is not >= 001010001 and <= 999999999 for Award Year 2002 and beyond. | E |
| 429 | Invalid Origination ID - Name Code not A-Z or '.' or ''' or '-', ' ', or " " for Award Year 2002 and beyond. | E |
| 430 | Duplicate Disbursement reference number. Reference number already used | D |
| 431 | Award Year is 2002 or greater and the Disbursement Reference number is nonnumeric or NOT between 01 to 65. | E |
| 432 | Disbursement amount would have been corrected to zero by Pell Processor calculations so the Disbursement record was rejected. | E |
| 440 | CMO rejected this student for inadequate missing eligibility documentation / information. | E |

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## Disbursements Edit Codes and Messages (Continued)

Edit Code Types: E = Reject, W = Warning, D = Duplicate

| Edit Code | Message | Type |
|---|---|---|
| 441 | CMO rejected this student for inadequate/missing fiscal documentation / information. | E |
| 442 | CMO rejected this student for inadequate/missing award or disbursing documentation / information. | E |
| 443 | CMO rejected this student for not meeting reporting requirements. | E |
| 444 | CMO rejected this student for failure to comply with requirements. | E |
| 445 | CMO rejected this student for inadequate or missing documentation. | E |

## Data Requests

Edit Code Types: E = Reject, W = Warning, D = Duplicate

| Edit Code | Message | Type |
|---|---|---|
| 601 | Invalid Attended Pell ID | E |
| 602 | Invalid Data Request Type | E |
| 603 | Invalid Requested Output Media Type | E |
| 604 | Invalid Pell Batch Number | E |
| 605 | Invalid Multiple Reporting Request Code 1, should be 'O' or 'D' | E |
| 606 | Invalid Multiple Reporting Request Code 2, should be 'A', 'S' or 'I' | E |
| 607 | Invalid MRR Student ID | E |
| 608 | Invalid MRR School ID | E |
| 609 | Requested/Matching Data Not Found | E |
| 610 | Student Not Originated at Requesting School | E |
| 611 | Invalid Reconciliation Origination ID | E |
| 612 | Invalid Reported Current SSN, Date of Birth or Student Name | E |

# Pell Grant-COD Edit Conversion Table

## Overview

The Pell Grant Edit Conversion Table provides a crosswalk of edits in the Recipient Financial Management System, (RFMS) with those in the COD System.

The table lists the legacy warning or reject codes and the corresponding message with the COD error code and message. The table references the COD error code and message that will be posted on the COD Web page after a legacy record is processed and the legacy edit/comment code that will be returned on the actual legacy record.

# Batch Edit/Reject Codes

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 201 | Missing/Mismatched Grant Batch Header | N/A | N/A for COD | 801 - Missing/Mismatched Grant Batch Header |
| 202 | Missing/Mismatched Grant Batch Trailer | N/A | N/A for COD | 802 - Missing/Mismatched Grant Batch Trailer |
| 203 | Duplicate Grant Batch Header | 003 | Duplicate Document ID | |
| 206 | Data Record Length must be numeric | 998 | Invalid Format | 803 - Data Record Length must be numeric |
| 207 | Reported Number of Records must be numeric | 998 | Invalid Format | 804 - Reported Number of Records must be numeric |
| 208 | Reported Total of Batch must be numeric | 998 | Invalid Format | 805 - Reported Total of Batch must be numeric |
| 209 | Invalid/Missing Batch Number | 994<br>996 | Missing Value<br>Invalid Value | 806 - Invalid/Missing Batch ID |
| 210 | Year must be numeric | 998 | Invalid Format | 807 - Year must be numeric |
| 211 | Pell ID must be numeric | 998 | Invalid Format | |
| 212 | Pell ID invalid or not found | 004 | Entity ID Not Found On Participant File | |
| 213 | Creation date must be numeric | 998 | Invalid Format | 808 - Creation date must be numeric |
| 214 | Creation time invalid | 996 | Invalid Value | 809 - Creation time invalid |
| 215 | Batch Type Invalid | 996 | Invalid Value | 810 - Batch Type Invalid |

## Batch Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 216 | Grantee DUNS does not match the school's Reporting Pell ID in Batch Number for Award Years prior to 2001-2002 | N/A | N/A for COD | 811 - Grantee DUNS does not match the school's 'Reporting Pell ID' in 'Batch ID' for Award Years prior to 2001-2002 |
| 217 | Discrepancy between different records with identical batch number | N/A | N/A for COD | 812 - Discrepancy between different records with identical Batch ID |
| 218 | Reported Number of Records does not equal count of detail records | 008 | Reported Number of Students Does Not Equal Detail Count | 813 - Reported Number of Records does not equal count of detail records |
| 219 | Total of Batch does not equal computed total of detail record amounts | 090 | Reported Amount of Disbursements does not equal Amount of detail records | 814 - Message Class, Batch ID, Origination Award Amount, Disbursement Amount, Reported Total of Batch |
| 220 | Reported Sign Indicator must be a valid indicator | N/A | N/A for COD | 815 - Reported Sign Indicator must be a valid indicator |
| 221 | Reporting Campus Pell School ID is a branch | 002 | Reporting Entity ID is Not Eligible To Report | |
| 222 | School is currently ineligible upon receipt of batch | 101 | The Reporting School Entity ID is listed as ineligible upon receipt of batch. | |
| 224 | Invalid Message Class | N/A | N/A for COD | 816 - Invalid Message Class |
| 225 | Data Record Length is not valid for Message Class | N/A | N/A for COD | 817 - Data Record Length is not valid for Message Class |
| 226 | Batch type code in Batch Number must equal record type for Message Class | N/A | N/A for COD | 818 - Batch Type code in Batch ID must equal record type for Message Class |
| 227 | Batch Create Date is greater than current system date | 006 | Document Create Date Greater Than Current System Date | |
| 228 | Batch Number indicates you have included a batch with data from a different Award Year | N/A | N/A for COD | 819 - Batch ID indicates you have included a Batch with data from a different Award Year |

## Batch Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 229 | Batch submitted prior to system start-up date | N/A | N/A for COD | |
| 230 | Disbursements submitted prior to award year start date | N/A | N/A for COD | |
| 231 | Reporting School must send Special Disbursement for Award Years prior to 2001-2002 | N/A | N/A for COD | |
| 232 | No detail records in Batch | 007 | No Detail Records In Document | |
| 233 | Invalid Destination Mailbox ID | 001 | Invalid Destination Mailbox ID | |
| | | | | |
| 236 | Trailer Message Class does not match the Header | N/A | N/A for COD | 821 - Trailer Message Class does not match the Header |
| 238 | Trailer Destination Mailbox ID does not match the Header | N/A | N/A for COD | 822 - Trailer Destination Mailbox ID does not match the Header |
| 240 | OPE ID Number does not match the Schools Reporting Pell ID in the Batch Number for Award Years after 2000-2001 | N/A | N/A for COD | 823 - OPE ID Number does not match the Schools Reporting Pell ID in the Batch ID for Award Years after 2000-2001 |

## Origination Edit/Reject Codes

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 301 | Invalid Origination ID | N/A | N/A for COD | 826 - Invalid Origination ID |
| 302 | Duplicate Origination for Award Year 2001 and before | N/A | N/A for COD | |
| 303 | Invalid Original SSN resulting in Pell Processor being unable to match with the Applicant record for Award Year 2002 and beyond<br>Invalid Original SSN or Name Code resulting in the Pell Processor being unable to match with the Applicant record for Award Year 2001 and before. | N/A | N/A for COD | 828 - Invalid Original SSN resulting in COD being unable to match with the Applicant record for Award Year 2002 and beyond<br>Invalid Original SSN or Name Code resulting in COD being unable to match with the Applicant record for Award Year 2000-2001 and before. |
| 304 | Attending and Reporting Funded campus mismatch or Origination Identifier Pell ID mismatch with Attending campus Pell ID | 034 | Attending School Entity Identifier has no relationship with the Reporting School Entity Identifier | |
| 305 | Invalid Award Amount Correction Applied | 039 | Incorrect Award Amount | |
| 306 | Invalid Disbursement Date/Correction Applied | 995 | Invalid Value; Correction Applied | |
| 307 | Invalid Enrollment Date/Correction Applied | 995 | Invalid Value; Correction Applied | |
| 308 | Invalid Low Tuition & Fees Code Correction Applied | 023 | Incorrect Low Tuition & Fees Code/ Correction Applied | |
| 309 | Invalid Verification Code/ Correction Applied | 995 | Invalid Value; Correction Applied | |

## Origination Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 310 | Invalid Incarcerated Federal Pell Recipient Code/Correction Applied | 995 | Invalid Value; Correction Applied | |
| 311 | Invalid Transaction Number | 024 | Reported CPS Transaction Number Does Not Match CPS | |
| 312 | Invalid Expected Family Contribution | N/A | N/A for COD | 824 - Invalid Expected Family Contribution |
| 313 | Invalid Secondary Expected Family Contribution/ Correction Applied | 026 | Incorrect Secondary EFC Used/ Correction Applied | |
| 314 | Invalid Academic Calendar/Correction Applied | 028 | Incorrect Academic Calendar/ Correction Applied | |
| 315 | Invalid Payment Methodology/ Correction Applied | 027 | Incorrect Payment Methodology/ Correction Applied | |
| 316 | Invalid number of Payment Periods/ Correction Applied for Award Year 2001 and before | N/A | N/A for COD | |
| 317 | Invalid Cost Of Attendance/Correction Applied | 995 | Invalid Value; Correction Applied | |
| 318 | Invalid Enrollment Status/Correction Applied | N/A | N/A for COD | |
| 319 | Invalid Weeks of Instructional Time in Program's Definition of Academic Year/Correction Applied | 029 | Invalid Weeks of Instructional Time in Program's Definition of Academic Year/Correction Applied | |
| 320 | Invalid Weeks of Instructional Time used to Calculate Payment/Correction Applied | 030 | Invalid Weeks of Instructional Time used to Calculate Payment | |

## Origination Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 321 | Invalid Credit or Clock Hours in program's definition of academic year/Correction Applied | 031 | Invalid Credit or Clock Hours in program's definition of academic year | |
| 322 | Invalid Credit or Clock Hours in all payment periods expected to complete this school year/Correction Applied | 032 | Invalid Credit or Clock Hours in all payment periods expected to complete this school year | |
| 323 | Origination is "Over Paid" and Negative Disbursement is Expected | 040 | Changed Award Amount Is Less Than Total Disbursements | |
| 324 | Invalid Name Code resulting in The Pell Processor being unable to match with the Applicant Record, or does not equal the name code in the Origination ID, for Award Year 2002 and beyond | N/A | N/A for COD | 829 - Invalid Name Code resulting in COD being unable to match with the Applicant Record, or does not equal the name code in the Origination ID, for Award Year 2002 and beyond |
| 325 | Invalid Origination ID - Pell ID is non-numeric for Award Year 2002 and beyond | 998 | Invalid Format | 830 - Invalid Origination ID - Pell ID is non-numeric for Award Year 2001- 2002 and beyond |
| 326 | Invalid Origination ID - Invalid Award Year for the Batch for Award Year 2002 and beyond | 996 | Invalid Value | 831 - Invalid Origination ID - Invalid Award Year for the Batch for Award Year 2001-2002 and beyond |
| 327 | Invalid Origination ID - Sequence Number is not "00" for Award Year 2002 and beyond | 996 | Invalid Value | 832 - Invalid Origination ID - Sequence Number is not "00" for Award Year 2001-2002 and beyond |

## Origination Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 328 | Invalid Origination ID - SSN is non-numeric, or is not >=001010001 and <= 999999999 for Award Year 2002 and beyond | N/A | N/A for COD | 833 - Invalid Origination ID - SSN is non-numeric, or is not >=001010001 and <= 999999999 for Award Year 2001-2002 and beyond |
| 329 | Invalid Origination ID – Name code not "A-Z" or "," or "-" for award year 2002 and beyond. | N/A | N/A for COD | |
| 330 | Duplicate SAR ID may be shared by two students for Award Year 2002 or beyond | N/A | N/A for COD | 835 - Duplicate SAR ID may be shared by two students for Award Year 2001-2002 or beyond |
| 331 | Duplicate Origination for Award Year 2002 and beyond | N/A | N/A for COD | 827 - Duplicate Origination for Award Year |
| 332 | Invalid Reported Current SSN for Award Year 2003 and beyond. | 011 | No eligible SSN, DOB, and last name combination match on CPS for student | |
| 333 | Invalid Reported Date of Birth for Award Year 2003 and beyond | 011 | No eligible SSN, DOB, and last name combination match on CPS for student | |
| 334 | Invalid Reported Last Name for Award Year 2003 and beyond. | 011<br>020 | No eligible SSN, DOB, and last name combination match on CPS for student<br>First and last name blank. | |
| 335 | Invalid Reported First Name for Award Year 2003 and beyond. | 020 | First and last name blank. | |
| 336 | Invalid Reported Middle Initial for Award Year 2003 and beyond. | 996 | Invalid Value | |
| 337 | Student not Pell eligible for Award Year 2003 and beyond. | 038 | Student not Pell Eligible | |

## Origination Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 338 | Duplicate match on CPS for Award Year 2003 and beyond | 025 | Duplicate match on CPS | |
| 339 | Origination Record reported with Zero Award Amount for Award year 2003 and beyond. | 042 | New award type submitted with a zero award amount | |
| 399 | New Origination Award or increase received after end of processing year and school has not been granted Administrative Relief | 043 | New Award Amount or Award Increase Received After End Of Processing Year and School Has Not Been Granted Administrative Relief (Pell)/ Extended Processing (DL) | |

# Disbursement Edit/Reject Codes

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 401 | Invalid Origination ID | N/A | N/A for COD | |
| 402 | Origination ID does not match a record in the Pell Processor database | N/A | N/A for COD | 848 - Origination ID does not match on COD |
| 403 | Disbursement Reference Number Already on File | N/A | N/A for COD | 841 - Disbursement Reference Number Already on File |
| 404 | Debit/Credit Indicator Flag Not Valid | N/A | N/A for COD | 842 - Debit/Credit Indicator Flag Not Valid |
| 405 | Disbursement Amount Not Valid because amount is non-numeric | 996 | Invalid Value | |
| 406 | Disbursement Amount Is Not in Valid Range | 067 | Incorrect Disbursement Amount | |
| 407 | Disbursement Date is Not Valid Date because date is non-numeric | 998 | Invalid Format | |
| 408 | Disbursement Date is Not Valid for Processing Date, not in Valid Range, or not a valid Date format | 051<br>053<br>996<br>998 | Disbursement Date With Payment Trigger Set to Yes Outside of Allowable Window<br>Disbursement Date cannot be blank<br>Invalid Format<br>Invalid Value | |
| 410 | Potential Concurrent Enrollment – Multiple Reporting. Sent separately | 069 | Potential Concurrent Enrollment - Notice Sent Separately | |
| 411 | Potential Overaward Project – Multiple Reporting. Sent separately | 068 | Potential Overaward Project- Notice Sent Separately | |

## Disbursement Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 412 | Negative Disbursement cannot be accepted without a previous positive disbursement | 996 | Invalid value | 843 - Negative Disbursement cannot be accepted without a previous accepted positive disbursement |
| 413 | Insufficient Negative Disbursement amount. Negative Disbursement is expected for difference amount | 065 | Insufficient Decrease in the Disbursement amount. Disbursement is expected for Amount of the Negative Pending | |
| 414 | Origination is in "Overpaid" status. Positive Disbursement cannot be accepted | 066 | Award is in "Overpaid" status. Disbursement Increase cannot be accepted | |
| 415 | School Eligibility Status indicates the School must submit a Special Disbursement Record and Award Year is 2000 – 2001 or prior | N/A | N/A for COD | |
| 416 | Negative Disbursement adjusted to reflect accepted Previous Disbursement Balance | N/A | N/A for COD | 844 - Negative Disbursement adjusted to reflect accepted Previous Disbursement Balance |
| 417 | Disbursement submitted after end of processing year and school has not been granted Administrative Relief | 071 | New Disbursement, Increase, or Payment Trigger to "Y" Received After End Of Processing Year and School Has Not Been Granted Administrative Relief (Pell)/Extended Processing (DL) | |

## Disbursement Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 418 | Origination indicates Verification Status 'W', Disbursement adjusted to the Origination Award Amount or 50% of the Scheduled Award Amount, whichever is lesser, and Award Year is 2000 – 2001 or prior | 064 | Disbursement Amount > 50% of award with Verification Status of "W" | |
| 419 | Origination indicates Verification Status 'W'. Verification W needs to be updated on the Origination record. | N/A | N/A for COD | "Legacy Edit to be added" |
| 420 | Origination indicates Verification Status 'W', only one disbursement allowed, and Award Year is 2000 – 2001 or prior | 061 | Only One Disbursement Allowed for Students with a Verification Status of "W" | |
| 422 | School is eligible, Payment Period Start Date is invalid or not in a valid range and Award Year is 2001 – 2002 or beyond | 996 | Invalid Value | |
| 423 | School is not eligible, Payment Period Start Date is invalid or not in a valid range and Award Year is 2001 – 2002 or beyond | 996 | Invalid Value | |
| 424 | School is not eligible, Payment Period Start Date is not in the eligible range and Award Year is 2001 – 2002 or beyond | 079<br>048 | Payment Period Start Date Not In Eligible Range<br>School is ineligible | |
| 425 | Invalid Origination ID - Pell ID is non-numeric for Award Year 2002 and beyond | N/A | N/A for COD | |

## Disbursement Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 426 | Invalid Origination ID - Invalid Award Year for the Batch for Award Year 2002 and beyond | N/A | N/A for COD | |
| 427 | Invalid Origination ID - Sequence number is not "00" for Award Year 2002 and beyond | N/A | N/A for COD | |
| 428 | Invalid Origination ID - SSN is not >=001010001 and <= 999999999 for Award Year 2002 and beyond | N/A | N/A for COD | |
| 429 | Invalid Origination ID - Name Code not<br>A-Z or<br>" . " or<br>" - " or<br>"  "<br>for Award Year 2002 and beyond | N/A | N/A for COD | |
| 430 | Duplicate Disbursement reference number. Reference number already at the Pell Processor | 058 | Duplicate Disbursement Information On File | |
| 431 | Award Year is 2002 or greater and the Disbursement Reference number is nonnumeric or not between 01 to 90 | 998<br>996 | Invalid Format<br>Invalid Value | |
| 432 | Disbursement amount would have been corrected to zero by the Pell Processor calculations so the disbursement record was rejected | N/A | N/A for COD | 845 - Disbursement amount would have been corrected to zero by COD calculations so the disbursement record was rejected |
| 440 | CMO rejected this student for inadequate/missing eligibility documentation/information | 083 | Case Management Office (CMO) Rejected This Student For Inadequate/ Missing Eligibility Documentation/ Information | |

## Disbursement Edit/Reject Codes (Continued)

| Legacy Reject Code | Legacy Edit Message | COD Error Code | COD Edit Message | COD Error Code & Message for Legacy Records Only |
|---|---|---|---|---|
| 441 | CMO rejected this student for inadequate/missing fiscal documentation/ information | 084 | CMO Rejected This Student For Inadequate/ Missing Fiscal Documentation/ Information | |
| 442 | CMO rejected this student for inadequate/missing award or disbursing documentation/information | 085 | CMO Rejected This Student For Inadequate/ Missing Award or Disbursing Documentation/ Information | |
| 443 | CMO rejected this student for not meeting reporting requirements | 086 | CMO Rejected This Student For Not Meeting Reporting Requirements | |
| 444 | CMO rejected this student for failure to comply with requirements | 087 | CMO Rejected This Student For Failure To Comply With Requirements | |
| 445 | CMO rejected this student for inadequate or missing documentation | 088 | CMO Rejected This Student For Inadequate or Missing Documentation | |

# *Appendix D*

# *Query Fields*

App Express Module D-1
Global Module D-16
Direct Loan Module D-20
Pell Module D-30
Packaging Module D-38

# Query Fields

## App Express Module

| FieldName | Length | ValidValues |
|---|---|---|
| AAI: ADJUSTED AVAILABLE INCOME | 8 | Valid values are -9999999 to 9999999 and blank. |
| ACADEMIC MAJOR | 10 | Text fields may include any alphanumeric character. You may also use all keyboard punctuation characters with the exception of underscore (_) and pipe (\|). Numeric fields may use any numeric value between -2,147,483,648 to 2,147,483,647. Date fields are eight characters in length and should be entered in CCYYMMDD format. Boolean field values are TRUE and FALSE. |
| ADD DATE - ISIR | 8 | Valid values are CCYYMMDD. |
| AGE OF OLDER PARENT | 2 | Valid values are 00-99 and blank. |
| AI: AVAILABLE INCOME | 8 | Valid values are -9999999 to 9999999 and blank. |
| ALIEN REGISTRATION NUMBER | 9 | Valid values are 000000001-999999999 and blank. |
| APA: ASSET PROTECTION ALLOWANCE | 9 | Valid values are 000000000 to 999999999 and blank. |
| APPLICATION RECEIPT DATE | 8 | Valid values are 20020101 to 20031231. |
| APPLICATION SOURCE SITE CODE | 2 | Valid values are 11 = Electronic App, 41 = FAFSA Express, 52,53,55,56 = MDE Mt. Vernon, 61 = FAFSA on the Web, and 62 = Renewal FAFSA on the Web. |
| ARE YOU MALE? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| ASSUMED CITIZENSHIP | 1 | Valid values are 1 = Assumed citizen, 2 = Assumed eligible non-citizen and blank. |
| ASSUMED DATE OF BIRTH PRIOR | 1 | Valid values are 1 = Assumed Yes, 2 = Assumed No, and blank. |
| ASSUMED FATHER'S INCOME FROM WORK | 7 | Valid values are -999999 to 999999 and blank. |
| ASSUMED FATHER'S SSN | 9 | Valid values are 000000000 to 999999999 and blank. |
| ASSUMED HAVE CHILDREN YOU SUPPORT? | 1 | Valid values are 1 = Assumed Yes, 2 = Assumed No, and blank. |
| ASSUMED HAVE LEGAL DEP OTHER THAN CHILDREN/SPOUSE | 1 | Valid values are 2 = Assumed no legal dependents and blank. |
| ASSUMED MOTHER'S INCOME FROM WORK | 7 | Valid values are -999999 to 999999 and blank. |
| ASSUMED MOTHER'S SSN | 9 | Valid values are 000000000 to 999999999 and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| ASSUMED PARENTS' # IN COLLEGE | 1 | Valid values are 0 to 9 and blank. |
| ASSUMED PARENTS' # IN FAMILY | 2 | Valid values are 00 to 99 and blank. |
| ASSUMED PARENTS' AGI | 7 | Valid values are -999999 to 999999 or blank. |
| ASSUMED PARENTS' MARITAL STATUS | 1 | Valid values are 1 = Assumed married/remarried, 2 = Assumed single and blank. |
| ASSUMED PARENTS' TOTAL FROM WORKSHEET C | 5 | Valid values are 00000 to 99999 and blank. |
| ASSUMED PARENTS' U.S. TAX PAID | 6 | Valid values are 000000 to 999999 and blank. |
| ASSUMED SPOUSE'S INCOME FROM WORK | 7 | Valid values are -999999 to 999999 and blank. |
| ASSUMED STUDENT IS MARRIED/REMARRIED | 1 | Valid values are 1 = Assumed Yes, 2 = Assumed No, and blank. |
| ASSUMED STUDENT'S # IN COLLEGE | 1 | Valid values are 0 to 9 and blank. |
| ASSUMED STUDENT'S # IN FAMILY | 2 | Valid values are 00 to 99 and blank. |
| ASSUMED STUDENT'S AGI | 7 | Valid values are -999999 to 999999 and blank. |
| ASSUMED STUDENT'S INCOME FROM WORK | 7 | Valid values are -999999 to 999999 and blank. |
| ASSUMED STUDENT'S MARITAL STATUS | 1 | Valid values are 1 = Assumed unmarried, 2 = Assumed married/remarried and blank. |
| ASSUMED STUDENT'S TOTAL FROM WORKSHEET C | 5 | Valid values are 00000 to 99999 and blank. |
| ASSUMED STUDENT'S U.S. TAX PAID | 5 | Valid values are 00000 to 99999 and blank. |
| ASSUMED VETERAN OF U.S. ARMED FORCES | 1 | Valid values are 2 = Assumed not a veteran and blank. |
| ASSUMPTION OVERRIDE 1 | 1 | Valid values are 1=Yes and blank. |
| ASSUMPTION OVERRIDE 2 | 1 | Valid values are 1 = Yes and blank. |
| ASSUMPTION OVERRIDE 3 | 1 | Valid values are 1=Yes and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| ASSUMPTION OVERRIDE 4 | 1 | Valid values are 1=Yes and blank. |
| ASSUMPTION OVERRIDE 5 | 1 | Valid values are 1=Yes and blank. |
| ASSUMPTION OVERRIDE 6 | 1 | Valid values are 1=Yes and blank. |
| ATI: ALLOWANCES AGAINST TOTAL INCOME | 7 | Valid values are 0000000 to 9999999 and blank. |
| AUTOMATIC ZERO EFC | 1 | Valid values are Y = EFC set to zero based on income criteria and Blank = Flag not set. |
| BATCH ID | 23 | Valid values are 2 characters for Batch Type (#A = Electronic App ISIRs, #C = Correction / Duplicate ISIRs, #F = FDR ISIRs, #G = CPS System Generated ISIRs, #I =YTD ISIRs, #K = State Agency Non-Resident ISIRs, #L = Full State Agency Resident ISIRs, #S = Signature ISIRs), 1 digit Cycle Year = 3, 6 characters for Federal School Code, 8 digits for current date in CCYYMMDD format, and 6 digits for current time in HHMMSS format. |
| BATCH YEAR | 1 | Valid values are 3 (for 2002-2003). |
| BORN BEFORE 01/01/1979? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| CAI: CONTRIBUTION FROM AVAILABLE INCOME | 8 | Valid values are -9999999 to 9999999 or blank. |
| CITIZENSHIP STATUS | 1 | Valid values are 1 = U.S. Citizen, 2 = Eligible Non-citizen, 3 = Ineligible Non-citizen and blank. |
| COMMENT CODES | 80 | Valid values are: See EDE Technical Reference. |
| CORRECTION APPLIED AGAINST TRANSACTION NUMBER | 2 | Valid values are 01 - 99 and blank. |
| CPS COMPUTE BATCH NUMBER | 3 | Valid values are 000-999. |
| DATE APPLICATION COMPLETED | 8 | Valid values are 20020101 to 20031231. |
| DATE OF BIRTH | 8 | Valid values are 19000101 to 19991231 and Blank. |
| DEGREE/CERTIFICATE | 1 | Valid values are 1 = 1st Bachelor's Degree, 2 = 2nd Bachelor's Degree, 3 = Associate Degree (occupational or technical program), 4 = Associate Degree (general education or transfer program), 5 = Certificate or diploma for completing an occupational, technical, or educational program of less than two years, 6 = Certificate or Diploma for completing an occupational, technical, or educational program of at least two years, 7 = Teaching Credential Program (non-degree program), 8 = Graduate or Professional Degree, 9 = Other/Undecided, and Blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| DEPENDENCY OVERRIDE | 1 | Valid values are 1 = Override, 2 = Cancel dependency override, 3 = Override failed, and blank = No overrride. |
| DEPENDENCY STATUS | 1 | Valid values are I = Independent, D = Dependent, X = Rejected Dependent, Y = Rejected Independent. |
| DNW: DISCRETIONARY NET WORTH | 10 | Valid values are -999999999 to 999999999 and blank. |
| DRIVER'S LICENSE NUMBER | 20 | Valid values are 0-9, A-Z, spaces, -(dash), * (asterisk) and blank. |
| DRIVER'S LICENSE STATE CODE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| DRN | 4 | Valid values are 0000 to 9999 or blank. |
| DRUG CONVICTION AFFECTING ELIGIBILITY? | 1 | Valid values are 1=No, 2=Yes(Part-Year), 3 =Yes/Don't know, and Blank. |
| DUPLICATE DATE | 8 | Valid values are 20020101 to 20031231 and blank. |
| DUPLICATE REQUEST INDICATOR | 1 | Valid values are D=duplicate request and blank=no duplicate request. |
| DUPLICATE SSN INDICATOR | 1 | Valid values are Y = Another filer also using this SSN and blank = No other person using this SSN. |
| EA: EMPLOYMENT ALLOWANCE | 7 | Valid values are 0000000 to 9999999 and blank. |
| EARLY ANALYSIS FLAG | 1 | Valid values are 1 = Early Applicant and blank = Not an Early Applicant. |
| EFC | 5 | Valid values are 00000-99999 and blank. |
| EFC CHANGE FLAG | 1 | Valid values are 1 = EFC increase, 2 = EFC decrease, and Blank = No change. |
| ELECTRONIC FEDERAL SCHOOL CODE INDICATOR | 1 | Valid values are 1 = College Choice 1, 2 = College Choice 2, 3 = College Choice 3, 4 = College Choice 4, 5 = College Choice 5, 6 = College Choice 6 and blank. |
| ELECTRONIC VERSION NUMBER | 6 | Valid values are V00000-V99999. |
| ENROLLMENT PLAN FALL 2002 | 1 | Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank. |
| ENROLLMENT PLAN SPRING 2003 | 1 | Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank. |
| ENROLLMENT PLAN SUMMER 2002 | 1 | Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| ENROLLMENT PLAN SUMMER 2003 | 1 | Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank. |
| ENROLLMENT PLAN WINTER 2002 | 1 | Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank. |
| ENROLLMENT STATUSES | 9 | Valid values are 1 = Full Time/Not Sure, 2 = 3/4 Time, 3 = 1/2 Time, 4 = Less than 1/2 Time, 5 = Not Attending, and blank. |
| ETI DESTINATION CODE | 7 | Valid values are TG00000-TG99999. |
| FAA ADJUSTMENT | 1 | Valid values are 1 = EFC Adjustment Processed, 2 = EFC Adjustment request failed, and blank. |
| FATHER'S GRADE LEVEL COMPLETED | 1 | Valid values are 1=Middle School/Jr. High, 2=High School, 3=College or Beyond, 4=Other/Unknown and blank. |
| FATHER'S INCOME EARNED FROM WORK | 7 | Valid values are -999999 to 999999 and blank. |
| FATHER'S/STEPFATHER'S LAST NAME | 16 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| FATHER'S/STEPFATHER'S SSN | 9 | Valid values are 000000000 to 999999999 and blank. |
| FEDERAL SCHOOL CODE 1 | 6 | Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999. |
| FEDERAL SCHOOL CODE 2 | 6 | Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999. |
| FEDERAL SCHOOL CODE 3 | 6 | Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999. |
| FEDERAL SCHOOL CODE 4 | 6 | Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999. |
| FEDERAL SCHOOL CODE 5 | 6 | Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999. |
| FEDERAL SCHOOL CODE 6 | 6 | Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999. |
| FEDERAL SCHOOL CODES 1-6 | 41 | Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999. |
| FIRST BACHELOR'S DEGREE BY 07/01/2002? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| FIRST NAME | 12 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| FTI: FISAP TOTAL INCOME | 8 | Valid values are -9999999 to 9999999 or blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| GRADE LEVEL IN COLLEGE | 1 | Valid values are 0 = 1st year, never attended college, 1 = 1st year, attended college before, 2 = 2nd year/sophomore, 3 = 3rd year/junior, 4 = 4th year/senior, 5 = 5th year/other undergraduate, 6 = 1st year graduate/professional, 7 = Continuing graduate/professional, and Blank. |
| HAVE CHILDREN YOU SUPPORT? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| HAVE DEPENDENTS OTHER THAN CHILDREN OR SPOUSE? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| HIGH SCHOOL DIPLOMA OR GED RECEIVED? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| HOUSING PLANS 1 | 1 | Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank. |
| HOUSING PLANS 1-6 | 11 | Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank. |
| HOUSING PLANS 2 | 1 | Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank. |
| HOUSING PLANS 3 | 1 | Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank. |
| HOUSING PLANS 4 | 1 | Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank. |
| HOUSING PLANS 5 | 1 | Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank. |
| HOUSING PLANS 6 | 1 | Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank. |
| IMPORTED AS PLUS LOAN | 1 | Valid values are Y=Yes and blank. |
| IMPORTED AS SUB LOAN | 1 | Valid values are Y=Yes and blank. |
| IMPORTED AS UNSUB LOAN | 1 | Valid values are Y=Yes and blank. |
| INPUT RECORD TYPE | 1 | Valid values are C = Correction Application, D = Duplicate Request, H = Correction, S = FAFSA Express or FAFSA on the Web Application, and Blank = Initial Application. |
| INS MATCH FLAG | 1 | Valid values are Y = Citizenship confirmed, N = Citizenship not confirmed, and Blank = No match performed. |
| INS VERIFICATION NUMBER | 15 | Valid values are 000000000000000 to 999999999999999 and blank. |
| INTERESTED IN STUDENT EMPLOYMENT? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| INTERESTED IN STUDENT LOANS? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| IPA: INCOME PROTECTION ALLOWANCE | 7 | Valid values are 0000000 to 9999999 and blank. |
| IS STUDENT MARRIED? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| ISIR TRANSACTION TYPE | 1 | Valid values are 0 = Elec. Initial App., 1 = Automatic ISIR, 2 = Elec. Corr., and 3 = Elec. Dup. Request. |
| LAST NAME | 16 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| LEGAL RESIDENCE DATE | 6 | Valid values are 190001 to 200312 and Blank. |
| MIDDLE INITIAL | 1 | Valid values are A-Z and blank. |
| MONTHLY VA EDUCATION BENEFITS | 4 | Valid values are 000 to 999 and blank. |
| MOTHER'S GRADE LEVEL COMPLETED | 1 | Valid values are 1=Middle School/Jr. High, 2=High School, 3=College or Beyond, 4=Other/Unknown and blank. |
| MOTHER'S INCOME EARNED FROM WORK | 7 | Valid values are -999999 to 999999 and blank. |
| MOTHER'S/STEPMOTHER'S LAST NAME | 16 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| MOTHER'S/STEPMOTHER'S SSN | 9 | Valid values are 000000000 to 999999999 and blank. |
| NO. OF MONTHS VA BENEFITS RECEIVED | 2 | Valid values are 00-12 and blank. |
| NSLDS DATABASE RESULTS FLAG | 1 | Valid Values are 1 = Record matched, data sent, 2 = SSN match, no name or date of birth match, no data sent, 3 = SSN not found in NSLDS, 4 = Full match, no relevant data to send. |
| NSLDS MATCH FLAG | 1 | Valid values are 1 = Eligible for Title IV Aid, 2 = Default, 3 = Overpayment, 4 = Default and Overpayment, 7 = Match but no data provided, and 8 = Record not sent to NSLDS. |
| NSLDS TRANSACTION NUMBER | 2 | Valid values are 01 to 99. |
| NW: EFC NET WORTH | 9 | Valid values are 000000000 to 999999999 and blank. |
| ORIGINAL NAME ID | 2 | Valid values are Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| ORIGINATING FEDERAL SCHOOL CODE | 6 | Valid values are 000000-999999, B00000-B99999, E00000-E99999 and G00000-G99999. |
| ORPHAN OR WARD OF COURT? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| PAID EFC | 5 | Valid values are 00000-99999 and blank. |
| PAID EFC TYPE | 1 | Valid values are P = Primary EFC, S = Secondary EFC, and Blank = None calculated. |
| PARENTS' ADJUSTED GROSS INCOME | 7 | Valid values are -999999 to 999999 and blank. |
| PARENTS' BUSINESS/FARM NET WORTH | 6 | Valid values are 000000 to 999999 and blank. |
| PARENTS' CALCULATED TAX STATUS | 1 | Valid values are 1, 2, or 3 = Tax Filer, 4 or 5 = Non-Tax Filer, and Blank. |
| PARENTS' CASH, SAVINGS, AND CHECKING | 6 | Valid values are 000000 to 999999 and blank. |
| PARENTS' ELIGIBLE TO FILE 1040A OR 1040EZ? | 1 | Valid values are 1 = Yes, 2 = No, 3 = Don't know, and Blank. |
| PARENTS' EXEMPTIONS CLAIMED | 2 | Valid values are 00-99 and blank. |
| PARENTS' INVESTMENT NET WORTH | 6 | Valid values are 000000-999999 and blank. |
| PARENTS' LEGAL RESIDENCE DATE | 6 | Valid values are 190001 to 200312 and Blank. |
| PARENTS' LEGAL RESIDENTS BEFORE 01/01/1997? | 1 | Valid values are 1 = Yes, 2 = No and blank. |
| PARENTS' MARITAL STATUS | 1 | Valid values are 1 = Married/Remarried, 2 = Single, 3 = Divorced/Separated, 4 = Widowed, and blank. |
| PARENTS' NUMBER IN COLLEGE | 1 | Valid values are 1 to 9 and blank. |
| PARENTS' NUMBER OF FAMILY MEMBERS | 2 | Valid values are 01 to 99 and blank. |
| PARENTS' STATE OF LEGAL RESIDENCE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| PARENTS' TAX RETURN FILED? | 1 | Valid values are 1 = Completed, 2 = Will file, 3 = Will not file, and Blank. |
| PARENTS' TOTAL FROM WORKSHEET A | 5 | Valid values are 00000 to 99999 and blank. |
| PARENTS' TOTAL FROM WORKSHEET B | 5 | Valid values are 00000 to 99999 and blank. |
| PARENTS' TOTAL FROM WORKSHEET C | 5 | Valid values are 00000 to 99999 and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| PARENTS' TYPE OF TAX RETURN USED? | 1 | Valid values are 1 = 1040, 2 = 1040A,1040EZ,1040Telefile, 3 = Foreign Tax Return, 4=Tax return from Puerto Rico, Guam, American Samoa, the Virgin Islands, Marshall Islands, the Federate States of Micronesia or Palau, and Blank. |
| PARENTS' U.S. INCOME TAX PAID | 6 | Valid values are 000000 to 999999 and blank. |
| PC: PARENTS' CONTRIBUTION | 7 | Valid values are 0000000 to 9999999 and blank. |
| PCA: PARENTS' CONTRIBUTION FROM ASSETS | 8 | Valid values are -9999999 to 9999999 and blank. |
| PELL GRANT ELIGIBILITY FLAG | 1 | Valid values are Y = This transaction determined eligible for a Federal Pell Grant and Blank = This transaction determined ineligible for a Federal Pell Grant. |
| PERMANENT ADDRESS | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PERMANENT CITY | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PERMANENT PHONE NUMBER | 10 | Valid values are 0000000000 to 9999999999 and blank. |
| PERMANENT STATE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| PERMANENT ZIP CODE | 5 | Valid values are 00000-99999 and blank. |
| PREPARER'S EIN | 9 | Valid values are 000000000 to 999999999 and blank. |
| PREPARER'S SIGNATURE | 1 | Valid values are 1=Yes and blank. |
| PREPARER'S SSN | 9 | Valid values are 000000000 to 999999999 and blank. |
| PRIMARY ALTERNATE MONTH 1 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY ALTERNATE MONTH 10 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY ALTERNATE MONTH 11 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY ALTERNATE MONTH 12 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY ALTERNATE MONTH 2 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY ALTERNATE MONTH 3 | 5 | Valid values are 00000-99999 and blank. |

## Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| PRIMARY ALTERNATE MONTH 4 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY ALTERNATE MONTH 5 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY ALTERNATE MONTH 6 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY ALTERNATE MONTH 7 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY ALTERNATE MONTH 8 | 5 | Valid values are 00000-99999 and blank. |
| PRIMARY EFC TYPE | 1 | Valid values are 1 = FNT: Dependent, 2 = FNT: Independent without dependents other than a spouse, 3 = FNT: Independent with dependents other than a spouse, 4 = SNT: Dependent, 5 = SNT: Independent without dependents other than a spouse, 6 = SNT: Independent with dependents other than a spouse, and Blank = None Calculated. |
| PRISONER MATCH | 1 | Valid values are 0 = Not Yet Sent to Match, Not a Prisoner, or Cannot be Verified/SSN match not successful, 1 = Prisoner in Local Facility, 2 = Prisoner in State or Federal Facility, 3 = No longer a Prisoner, and 8 = Cannot be Sent to Match |
| RECORD TYPE | 1 | Valid values are C = Correction Application, H = Correction and blank = Initial Electronic Application |
| REGISTER FOR SELECTIVE SERVICE? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| REJECT OVERRIDE B | 1 | Valid values are 1 = Yes and blank. |
| REJECT OVERRIDE N | 1 | Valid values are 1 = Yes and blank. |
| REJECT OVERRIDE W | 1 | Valid values are 1 = Yes and blank. |
| REJECT REASON CODES | 21 | Valid values: See Processing Codes/System Requirements section of the EDE Technical Reference for specific code tables and details. |
| REPROCESSED REASON CODE | 2 | Valid values are 01 to 99 and blank. |
| SAR ACKNOWLEDGEMENT COMMENT CODES | 20 | Valid values are: See EDE Technical Reference. |
| SAR C FLAG | 1 | Valid values are Y = C flag set, resolution required on one or more match results and Blank = No flag set. |
| SATI: STUDENT'S ALLOWANCE AGAINST TOTAL INCOME | 8 | Valid values are -9999999 to 9999999 and blank. |
| SCA: STUDENT'S CONTRIBUTION FROM ASSETS | 7 | Valid values are -999999 to 999999 and blank. |

## Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| SDNW: STUDENT'S DISCRETIONARY NET WORTH | 10 | Valid values are -99999999 to 999999999 and blank. |
| SEC AAI: SECONDARY ADJUSTED AVAILABLE INCOME | 8 | Valid values are -9999999-9999999 and blank. |
| SEC AI: SECONDARY AVAILABLE INCOME | 8 | Valid values are -9999999-9999999 and blank. |
| SEC APA: SECONDARY ASSET PROTECTION ALLOWANCE | 9 | Valid values are 000000000-999999999 and blank. |
| SEC ATI: SECONDARY ALLOWANCE AGAINST TOTAL INCOME | 7 | Valid values are 0000000-9999999 and blank. |
| SEC CAI: SECONDARY CONTRIBUTION FROM AVAILABLE INC | 8 | Valid values are -9999999-9999999 and blank. |
| SEC DNW: SECONDARY DISCRETIONARY NET WORTH | 10 | Valid values are -999999999-999999999 and blank. |
| SEC EA: SECONDARY EMPLOYMENT ALLOWANCE | 7 | Valid values are 0000000-9999999 and blank. |
| SEC FTI: SECONDARY FISAP TOTAL INCOME | 7 | Valid values are -999999-999999 and blank. |
| SEC IPA: SECONDARY INCOME PROTECTION ALLOWANCE | 7 | Valid values are 0000000-9999999 and blank. |
| SEC NW: SECONDARY NET WORTH | 9 | Valid values are 000000000-999999999 and blank. |
| SEC PC: SECONDARY PARENTS CONTRIBUTION | 7 | Valid values are 0000000-9999999 and blank. |
| SEC PCA: SECONDARY PARENT'S CONTRIBUTION ASSETS | 7 | Valid values are -999999-999999 and blank. |
| SEC SATI: SECONDARY STD'S ALLOW AGAINST TOTAL INC | 9 | Valid values are -99999999-99999999 and blank. |
| SEC SCA: SECONDARY STUDENT'S ASSET CONTRIBUTION | 7 | Valid values are -999999-999999 and blank. |
| SEC SDNW: SECONDARY DISCRETIONARY NET WORTH (STUD) | 9 | Valid values are -99999999-99999999 and blank. |
| SEC SIC: SECONDARY DEP STUDENT'S INC CONTRIBUTION | 7 | Valid values are 0000000-999999 and blank. |
| SEC STI: SECONDARY STUDENT'S TOTAL INCOME | 8 | Valid values are -9999999 to 9999999 and blank. |
| SEC STX: SECONDARY STATE TAX ALLOWANCE | 8 | Valid values are -9999999-9999999 and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| SEC TI: SECONDARY TOTAL INCOME | 8 | Valid values are -9999999-9999999 and blank. |
| SEC TPC: SECONDARY TOTAL PARENT CONTRIBUTIONS | 7 | Valid values are 0000000-9999999 and blank. |
| SEC TSC: SECONDARY TOTAL STUDENT CONTRIBUTIONS | 7 | Valid values are 0000000-9999999 and blank. |
| SECONDARY ALTERNATE MONTH 1 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 10 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 11 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 12 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 2 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 3 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 4 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 5 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 6 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 7 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY ALTERNATE MONTH 8 | 5 | Valid values are 00000-99999 and blank. |
| SECONDARY EFC | 5 | Valid values are 00000-99999 and Blank = None calculated. |
| SECONDARY EFC TYPE | 1 | Valid values are 1 = FNT: Dependent, 2 = FNT: Independent without dependents other than a spouse, 3 = FNT: Independent with dependents other than a spouse, 4 = SNT: Dependent, 5 = SNT: Independent without dependents other than a spouse, 6 = SNT: Independent with dependents other than a spouse, and Blank = None Calculated. |
| SECONDARY INS MATCH FLAG | 1 | Valid values are Y =Citizenship status confirmed by INS, C = INS has not yet confirmed eligible non-citizen status, N = INS did not confirm eligible non-citizen status, X = INS did not have enough information to confirm eligible non-citizen status and Blank = N/A |
| SELECTED FOR VERIFICATION | 1 | Valid values are Y = Selected, N = Not Selected, and * = Subsequent Transaction was selected for verification. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| SELECTIVE SERVICE MATCH FLAG | 1 | Valid values are Y = status confirmed, N = status not confirmed, T = temp. exempt, and blank = record not sent to SS. |
| SELECTIVE SERVICE REGISTRATION FLAG | 1 | Valid values are Y = Reg. Completed, N = Reg. Not Completed, T = Temp. Exempt, and blank = record not sent to SS. |
| SERIAL NUMBER | 5 | Valid values are 00001 to 99999. |
| SIC: DEPENDENT STUDENTS' INCOME CONTRIBUTION | 7 | Valid values are 0000000 to 9999999 and blank. |
| SIGNED BY | 1 | Valid values are A = Applicant, B = Applicant and Parent, P = Parent, and Blank. |
| SIMPLIFIED NEEDS TEST (SNT) | 1 | Valid values are Y = SNT met, N = SNT not met or insufficient information to determine SNT eligibility and blank. |
| SOURCE OF CORRECTION | 1 | Valid values are A = Applicant, D = CPS, and S = School. |
| SPOUSE'S INCOME EARNED FROM WORK | 7 | Valid values are -999999 to 999999 and blank. |
| SSA CITIZENSHIP FLAG | 1 | Valid values are A = U.S. citizen, B = Legal alien, eligible to work, C = Legal alien, not eligible to work, D = Other, E = Alien, student restricted, work authorized, F = Conditionally legalized alien, N = Unable to verify citizenship due to no match on SSN, name or date of birth, * = Foreign, and Blank = Domestic born (U.S. Citizen). |
| SSN DATE OF DEATH | 8 | Valid values are 19000101 to 20031231 and blank. |
| SSN MATCH FLAG | 1 | Valid values are 1 = No match on SSN, 2 = SSN and name match, no match on DOB, 3 = SSN match, no match on name, 4 = SSN, Name, and DOB match, 5 = SSN, name, DOB match with Date of Death, and 8 = Record not sent to SSA. |
| STI: STUDENT'S TOTAL INCOME | 8 | Valid values are -9999999 to 9999999 and blank. |
| STUDENT ELIGIBLE TO FILE 1040A OR 1040EZ? | 1 | Valid values are 1 = Yes, 2 = No, 3 = Don't know, and Blank. |
| STUDENT ID | 13 | Valid values are 001010001 to 999999999 in positions 1-9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank in position 10-11, and 01 to 00 in positions 12-13. |
| STUDENT LEGAL RESIDENT BEFORE 01/01/1997? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| STUDENT'S ADJUSTED GROSS INCOME | 7 | Valid values are -999999 to 999999 and blank. |
| STUDENT'S BUSINESS/FARM NET WORTH | 6 | Valid values are 000000 to 999999 and blank. |
| STUDENT'S CALCULATED TAX STATUS | 1 | Valid values are 1, 2, or 3 = Tax Filer, 4 or 5 = Non-Tax Filer, and Blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| STUDENT'S CASH, SAVINGS, AND CHECKING | 6 | Valid values are 000000 to 999999 and blank. |
| STUDENT'S CURRENT SSN | 9 | Valid values are 001010001 to 999999999. |
| STUDENT'S EXEMPTIONS CLAIMED | 2 | Valid values are 00-99 and blank. |
| STUDENT'S INCOME EARNED FROM WORK | 7 | Valid values are -999999 to 999999 and blank. |
| STUDENT'S INVESTMENT NET WORTH | 6 | Valid values are 000000 to 999999 and blank. |
| STUDENT'S LAST NAME/SSN CHANGE FLAG | 1 | Valid values are N = Last Name change, S = Social Security Number change, B = Social Security Number and last name change, and Blank = No change. |
| STUDENT'S MARITAL STATUS | 1 | Valid values are 1 = Unmarried (Single, Divorced, or Widowed), 2 = Married/Remarried, 3 = Separated and Blank. |
| STUDENT'S MARITAL STATUS DATE | 6 | Valid values are 190001 to 200312 and Blank. |
| STUDENT'S NUMBER IN COLLEGE | 1 | Valid values are 0 to 9 and blank. |
| STUDENT'S NUMBER OF FAMILY MEMBERS | 2 | Valid values are 00 to 99 and blank. |
| STUDENT'S STATE OF LEGAL RESIDENCE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| STUDENT'S TAX RETURN FILED? | 1 | Valid values are 1 = Completed, 2 = Will file, 3 = Will not file, and Blank. |
| STUDENT'S TOTAL FROM WORKSHEET A | 5 | Valid values are 00000 to 99999 and blank. |
| STUDENT'S TOTAL FROM WORKSHEET B | 5 | Valid values are 00000 to 99999 and blank. |
| STUDENT'S TOTAL FROM WORKSHEET C | 5 | Valid values are 00000 to 99999 and blank. |
| STUDENT'S TYPE OF TAX RETURN USED? | 1 | Valid values are 1 = 1040, 2 = 1040A,1040EZ,1040Telefile, 3 = Foreign Tax Return, 4 = Tax return from Puerto Rico, Guam, American Samoa, the Virgin Islands, Marshall Islands, the Federate States of Micronesia or Palau, and Blank. |
| STUDENT'S U.S. INCOME TAX PAID | 5 | Valid values are 00000-99999 and blank. |
| STX: STATE TAX ALLOWANCE | 8 | Valid values are -9999999 to 9999999 and blank. |
| SUBSEQUENT APPLICATION FLAG | 1 | Valid values are Y=Yes and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| SYSTEM GENERATED INDICATOR | 1 | Valid values are A = Applicant released from Drug Enforcement hold, D = Duplicate request, I = INS Secondary confirmation, L = Duplicate request and NSLDS match data has changed, N = NSLDS post-screening, P = Prisoner Post-Screened, Z = Reprocessed, and Blank = Not a systems generated transaction. |
| TI: TOTAL INCOME | 8 | Valid values are -9999999 to 9999999 and blank. |
| TPC: TOTAL PARENT CONTRIBUTION | 7 | Valid values are 0000000 to 9999999 and blank. |
| TRANSACTION NUMBER | 2 | Valid values are 01 to 99. |
| TRANSACTION PROCESSED DATE | 8 | Valid values are 20020101 to 20031231 |
| TRANSACTION RECEIPT DATE | 8 | Valid values are 20020101 to 20031231. |
| TRANSACTION SOURCE SITE CODE | 2 | Valid values are 11 = Electronic App, 31 = Electronic Correction, 41 = FAFSA Express, 51,54 = MDE Lawrence, 52,53,55,56 = MDE Mt. Vernon, 61 = FAFSA on the Web, 62 = Renewal FAFSA on the Web, 63 = Corrections on the Web, 64 = FAA Corrections on the Web, 72 = CPS System Generated, 73 = CPS NSLDS Post-Screening, 74 = CPS FDR and YTD, 75 = CPS Signature HC, 76 = CPS INS Secondary Confirmation, 77 = CPS Prisoner Post-Screen, and 81 = PIC. |
| TSC: TOTAL STUDENT CONTRIBUTION | 7 | Valid values are 0000000 to 9999999 and blank. |
| VA MATCH FLAG | 1 | Valid values are 1 = Veteran status confirmed, 2 = Record found on VA database but not a qualifying Veteran, 3 = Record not found on VA database, 4 = Record found on VA database but applicant on Active duty, 8 = Record not sent to VA, and Blank. |
| VETERAN OF U.S. ARMED FORCES? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |
| WORKING ON A MASTER'S OR DOCTORATE IN 2002-2003? | 1 | Valid values are 1 = Yes, 2 = No, and blank. |

# Query Fields

## Global Module

| FieldName | Length | ValidValues |
|---|---|---|
| ACTIVE TRANSACTION | 2 | Valid values are 01-99. |
| ACTIVE TRANSACTION DATE | 8 | Valid values are CCYYMMDD. |
| ACTIVE TRANSACTION ID | 8 | Valid values are A-Z, .(period), ' (apostrophe), - (dash) spaces(s) and blank. |
| ADD DATE | 8 | Valid values are CCYYMMDD. |
| ADD TIME | 6 | Valid values are HHMMSS. |
| ADD USERID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| ALIEN REGISTRATION # | 9 | Valid values are 000000001 to 999999999 and blank. |
| CITIZENSHIP STATUS - DEMO | 1 | Valid values are 1 = U.S. Citizen, 2 = Eligible Non-citizen, 3 = Ineligible Non-citizen and blank. |
| CURRENT SSN | 9 | Valid values are 001010001 to 999999999. |
| DATE OF BIRTH - DEMO | 8 | Valid values are CCYYMMDD. |
| DATE OF BIRTH CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| DEPENDENCY STATUS - DEMO | 1 | Valid values are I = Independent, D = Dependent and blank. |
| DOCUMENT STATUS | 1 | Valid values are B = Documents still needed for both packaging and verification, C = All documents are satisfied (includes documents required for both packaging and verification), V = Documents still needed for verification, P = Documents still needed for packaging, O = Other documents needed but not required for packaging or verification, D=Documents received but still need to be reviewed, and Blank = Status Not Determined or no documents attached to record. |
| DRIVER'S LICENSE # | 20 | Valid values are 0-9, A-Z, spaces, -(dash), * (asterisk) and blank. |
| DRIVER'S LICENSE STATE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| E-MAIL ADDRESS | 50 | Valid values are 0 to 9, Uppercase A to Z, Lowercase a to z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - |

## Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| | | (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| FIRST NAME - DEMO | 12 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| HAS CORRECTION RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS DOCUMENT TRACKING RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS FAFSA RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS LOAN RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS NOTES RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS NSLDS RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS PACKAGING RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS PELL RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS VERIFICATION WORKSHEET RECORD | 1 | Valid values are Y = Yes and N = No. |
| ISIR DL MPN FLAG | 1 | Valid values are A = Active, I = Inactive, C = Closed, N = No MPN on file, U = Unavailable, and blank. |
| LAST MAILED DATE | 8 | Valid values are CCYYMMDD. |
| LAST NAME - DEMO | 16 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| LEGAL RESIDENCE DATE - DEMO | 6 | Valid values are 190001 to 200312 and Blank. |
| LETTER COUNT | 2 | Valid values are 0-9 and blank. |
| LOAN ENTRANCE INTERVIEW DATE? | 8 | Valid values are CCYYMMDD. |
| LOCAL ADDRESS | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| LOCAL ADDRESS CHANGE DATE | 8 | Valid values are CCYYMMDD. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| LOCAL CITY | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| LOCAL PHONE | 10 | Valid values are 0000000000 to 9999999999 and blank. |
| LOCAL STATE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| LOCAL ZIP CODE | 9 | Valid values are 000000000 to 999999999 and blank. |
| MIDDLE INITIAL - DEMO | 1 | Valid values are A-Z and blank. |
| NAME ID | 2 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| ORIGINAL SSN - DEMO | 9 | Valid values are 001-01-0001 to 999-99-9999. |
| PERMANENT ADDRESS - DEMO | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PERMANENT ADDRESS CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| PERMANENT CITY - DEMO | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PERMANENT PHONE NUMBER - DEMO | 10 | Valid values are 0000000000 to 9999999999 and blank. |
| PERMANENT STATE - DEMO | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| PERMANENT ZIP CODE - DEMO | 9 | Valid values are 000000000 to 999999999 and blank. |
| PREVIOUS TRANSACTION | 2 | Valid values are 01-99. |
| PROGRAM OF STUDY | 10 | Text fields may include any alphanumeric character. You may also use all keyboard punctuation characters with the exception of underscore (_) and pipe (\|). Numeric fields may use any numeric value between -2,147,483,648 to 2,147,483,647. Date fields are eight characters in length and should be entered in CCYYMMDD format. Boolean field values are TRUE and FALSE. |
| RECORD SOURCE | 1 | Valid values are M = Manual Entry, I = ISIR Import, P = Packaging External Add Import, L = Direct Loan External Add Import, E = Pell External Add Import, Y = Prior Year Demographic Import, R = Direct Loan Rebuild Import, D = Demographic Data external import, O = Pell Originiation Ack - regular, W = Pell Originiation Ack - web, X = Pell YTD and blank. |
| SCHOOL USE | 20 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), |

## Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| | | { (Open Brace), } (Closed Brace), Space and Blank. |
| SSN CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| STUDENT'S STATE OF LEGAL RESIDENCE - DEMO | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| TRANS PAID ON | 2 | Valid values are 01-99 |
| TRANSACTION # | 2 | Valid values are 00-99. |
| UPDATE DATE | 8 | Valid values are CCYYMMDD. |
| UPDATE ID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| UPDATE TIME | 6 | Valid values are HHMMSS. |
| VERIFICATION STATUS CODE - DEMO | 1 | Valid values are V = Verified, W = Without documentation, and blank. |

# Query Fields

### Direct Loan Module

| FieldName | Length | ValidValues |
|---|---|---|
| ACADEMIC MAJOR | 10 | Text fields may include any alphanumeric character. You may also use all keyboard punctuation characters with the exception of underscore (_) and pipe (\|). Numeric fields may use any numeric value between -2,147,483,648 to 2,147,483,647. Date fields are eight characters in length and should be entered in CCYYMMDD format. Boolean field values are TRUE and FALSE. |
| ACADEMIC YEAR END DATE | 8 | Valid values are CCYYMMDD. |
| ACADEMIC YEAR START DATE | 8 | Valid values are CCYYMMDD. |
| ACTIVE TRANSACTION | 2 | Valid values are 01-99. |
| ACTIVE TRANSACTION DATE | 8 | Valid values are CCYYMMDD. |
| ACTIVE TRANSACTION ID | 8 | Valid values are A-Z, .(period), ' (apostrophe), - (dash) spaces(s) and blank. |
| ACTUAL DISBURSEMENT BATCH ID | 23 | Valid values are 2 characters for Batch Type (#H = Disbursement, SP = Payment to Servicer, WG = Web Generated, or RB = Rebuild), 1 digit Cycle Year = 3, 6 characters for Direct Loan Federal School Code, 8 digits for current date in CCYYMMDD format, and 6 digits for current time in HHMMSS format. |
| ACTUAL DISBURSEMENT CONFIRMED | 1 | Valid values are Y=Yes and blank = No. |
| ACTUAL DISBURSEMENT DATE | 8 | Valid values are CCYYMMDD. |
| ACTUAL DISBURSEMENT EXPORT TO EXTERNAL FLAG | 1 | Valid values are Y=Yes and N=No. |
| ACTUAL DISBURSEMENT GROSS AMOUNT | 5 | Valid values are 00000-99999. |
| ACTUAL DISBURSEMENT INTEREST REBATE AMOUNT | 5 | Valid values are 00000-99999. |
| ACTUAL DISBURSEMENT LOAN FEE AMOUNT | 5 | Valid values are 00000-99999. |
| ACTUAL DISBURSEMENT NET ADJUSTMENT AMOUNT | 6 | Valid values are -99999-99999. |
| ACTUAL DISBURSEMENT NET AMOUNT | 5 | Valid values are 00000-99999. |
| ACTUAL DISBURSEMENT NUMBER | 2 | Valid values are 01-20. |

## Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| ACTUAL DISBURSEMENT REJECT CODES | 21 | Valid values: See Direct Loan Technical Reference. |
| ACTUAL DISBURSEMENT SCHOOL CODE | 6 | Valid values are X00000 - X99999 where X = G or E. |
| ACTUAL DISBURSEMENT SEQUENCE NUMBER | 4 | Valid values are 0001-9999. |
| ACTUAL DISBURSEMENT STATUS | 1 | Valid values are N=Not Ready, R=Ready, B=Batched, A=Accepted and E=Rejected. |
| ACTUAL DISBURSEMENT TYPE | 1 | Valid values are D = Initial Disbursement, A = Adjusted Disbursement Amount, Q = Adjusted Disbursement Date, P = Servicer Refund. |
| ADD DATE | 8 | Valid values are CCYYMMDD. |
| ADD DATE (LOAN) | 8 | Valid values are CCYYMMDD. |
| ADD ID (LOAN) | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| ADD TIME | 6 | Valid values are HHMMSS. |
| ADD TIME (LOAN) | 6 | Valid values are HHMMSS. |
| ADD USERID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| ADDITIONAL UNSUB ELIG FOR DEPENDENT STUDENT | 1 | Valid values are Y= Yes and blank = No. |
| ADDITIONAL UNSUB ELIG FOR HEALTH PROF PROG | 1 | Valid Values are Y=Yes or blank. |
| ALIEN REGISTRATION # | 9 | Valid values are 000000001 to 999999999 and blank. |
| ANTICIPATED DISBURSEMENT DATE | 8 | Valid values are CCYYMMDD. |
| ANTICIPATED DISBURSEMENT EXPORT TO EXTERNAL FLAG | 1 | Valid values are Y=Yes and N=No. |
| ANTICIPATED DISBURSEMENT FEE AMOUNT | 5 | Valid values are 00000-99999. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| ANTICIPATED DISBURSEMENT GROSS AMOUNT | 5 | Valid values are 00000-99999. |
| ANTICIPATED DISBURSEMENT INTEREST REBATE AMOUNT | 5 | Valid values are 00000-99999. |
| ANTICIPATED DISBURSEMENT NET AMOUNT | 5 | Valid values are 00000-99999. |
| ANTICIPATED DISBURSEMENT NUMBER | 2 | Valid values are 01-20. |
| ANTICIPATED DISBURSEMENT SCHOOL CODE | 6 | Valid values are X00000 - X99999 where X = G or E. |
| BOOKED BATCH ID | 23 | Valid values are 2 characters for Batch Type (#B = Booking Notification or RB = Rebuild), 1 digit Cycle Year = 3, 6 characters for Direct Loan Federal School Code, 8 digits for current date in CCYYMMDD format, and 6 digits for current time in HHMMSS format. |
| BOOKED DATE | 8 | Valid values are CCYYMMDD. |
| BOOKED STATUS | 1 | Valid values are A and Blank. |
| CITIZENSHIP STATUS - DEMO | 1 | Valid values are 1 = U.S. Citizen, 2 = Eligible Non-citizen, 3 = Ineligible Non-citizen and blank. |
| CREDIT DECISION | 1 | Valid values are A = Credit approved, N = Credit denied; need endorser, C = Credit overridden; new credit information provided, E = Credit overridden; endorser OK, D = Credit denied; endorser not OK, X = Credit decision pending, F = Credit denied per LOC web site, or blank. |
| CREDIT DECISION DATE | 8 | Valid values are CCYYMMDD. |
| CREDIT DECISION UPDATE DATE | 8 | Valid values are CCYYMMDD. |
| CURRENT SSN | 9 | Valid values are 001010001 to 999999999. |
| DATE OF BIRTH - DEMO | 8 | Valid values are CCYYMMDD. |
| DATE OF BIRTH CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| DEPENDENCY STATUS - DEMO | 1 | Valid values are I = Independent, D = Dependent and blank. |
| DEPENDENCY STATUS - DL | 1 | Valid values are I = Independent, D = Dependent and blank. |
| DIRECT LOAN SCHOOL CODE | 6 | Valid values are X00000 - X99999 where X = G or E. |
| DISCLOSURE PRINTED | 1 | Valid values are TRUE=Yes and FALSE=No. |

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# *Query Fields*

| FieldName | Length | ValidValues |
|---|---|---|
| DISCLOSURE STATEMENT PRINT INDICATOR | 1 | Valid values are S = LOC Print (send to student), O = On-site (School Print), and Z = LOC Reprint (send to student). |
| DOCUMENT STATUS | 1 | Valid values are B = Documents still needed for both packaging and verification, C = All documents are satisfied (includes documents required for both packaging and verification), V = Documents still needed for verification, P = Documents still needed for packaging, O = Other documents needed but not required for packaging or verification, D=Documents received but still need to be reviewed, and Blank = Status Not Determined or no documents attached to record. |
| DRIVER'S LICENSE # | 20 | Valid values are 0-9, A-Z, spaces, -(dash), * (asterisk) and blank. |
| DRIVER'S LICENSE STATE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| E-MAIL ADDRESS | 50 | Valid values are 0 to 9, Uppercase A to Z, Lowercase a to z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| EXPORT TO COD | 1 | Valid values are TRUE=Yes and FALSE=No. |
| EXPORT TO EXTERNAL SYSTEM | 1 | Valid values are TRUE=Yes and FALSE=No. |
| FIRST DISBURSEMENT FLAG | 1 | Valid values are C = Changed to First Disbursement and blank. |
| FIRST NAME - DEMO | 12 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| GRADE LEVEL IN COLLEGE - DL | 1 | Valid values are 0 = 1st year, never attended college, 1 = 1st year, attended college before, 2 = 2nd year/sophomore, 3 = 3rd year/junior, 4 = 4th year/senior, 5 = 5th year/other undergraduate, 6 = 1st year graduate/professional, 7 = Continuing graduate/professional, and Blank. |
| HAS CORRECTION RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS DOCUMENT TRACKING RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS FAFSA RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS LOAN RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS NOTES RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS NSLDS RECORD | 1 | Valid values are Y = Yes and N = No. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| HAS PACKAGING RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS PELL RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS VERIFICATION WORKSHEET RECORD | 1 | Valid values are Y = Yes and N = No. |
| INACTIVE DATE | 8 | Valid values are CCYYMMDD. |
| INACTIVE FLAG | 1 | Valid values are TRUE=Yes and FALSE=No. |
| INTEREST REBATE PERCENTAGE | 6 | Valid values are 00.000 - 99.999. |
| ISIR DL MPN FLAG | 1 | Valid values are A = Active, I = Inactive, C = Closed, N = No MPN on file, U = Unavailable, and blank. |
| LAST MAILED DATE | 8 | Valid values are CCYYMMDD. |
| LAST NAME - DEMO | 16 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| LEGAL RESIDENCE DATE - DEMO | 6 | Valid values are 190001 to 200312 and Blank. |
| LETTER COUNT | 2 | Valid values are 0-9 and blank. |
| LOAN AMOUNT APPROVED | 5 | Valid values are 00000-99999. |
| LOAN AMOUNT REQUESTED | 5 | Valid values are 00000-99999. |
| LOAN ENTRANCE INTERVIEW DATE? | 8 | Valid values are CCYYMMDD. |
| LOAN FEE PERCENTAGE | 6 | Valid values are 00.000 - 99.999. |
| LOAN ID (ACTUAL DISBURSEMENT) | 21 | Valid values are 9 characters for Student's Social Security number (001010001–999999999), 1 character for Loan Type (S = Subsidized, U = Unsubsidized, P = PLUS), 2 digits for Program Year = 03, 6 characters for School Code (X00000 - X99999 where X = G or E), 3 digits for Loan Sequence Number = 001 – 999. |
| LOAN ID (ANTICIPATED DISBURSEMENT) | 21 | Valid values are 9 characters for Student's Social Security number (001010001–999999999), 1 character for Loan Type (S = Subsidized, U = Unsubsidized, P = PLUS), 2 digits for Program Year = 03, 6 characters for School Code (X00000 - X99999 where X = G or E), 3 digits for Loan Sequence Number = 001 – 999. |
| LOAN ID (LOAN) | 21 | Valid values are 9 characters for Student's Social Security number (001010001–999999999), 1 character for Loan Type (S = Subsidized, U = Unsubsidized, P = PLUS), 2 digits for Program Year = 03, 6 characters for |

## *Query Fields*

| FieldName | Length | ValidValues |
|---|---|---|
| | | School Code (X00000 - X99999 where X = G or E), 3 digits for Loan Sequence Number = 001 – 999. |
| LOAN ORIGINATION DATE | 8 | Valid values are CCYYMMDD. |
| LOAN PERIOD CODE | 2 | Valid values are A-Z, 0-9, + (plus), - (dash), * (asterisk), # (pound sign), . (period), and ' (apostrophe). |
| LOAN PERIOD END DATE | 8 | Valid values are CCYYMMDD. |
| LOAN PERIOD START DATE | 8 | Valid values are CCYYMMDD. |
| LOAN STATUS | 1 | Valid values are N=Not Ready, R=Ready, B=Batched, A=Accepted and E=Rejected. |
| LOAN TYPE | 1 | Valid values are P=PLUS, S=Direct Subsidized and U=Direct Unsubsidized. |
| LOCAL ADDRESS | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| LOCAL ADDRESS CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| LOCAL CITY | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| LOCAL PHONE | 10 | Valid values are 0000000000 to 9999999999 and blank. |
| LOCAL STATE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| LOCAL ZIP CODE | 9 | Valid values are 000000000 to 999999999 and blank. |
| MIDDLE INITIAL - DEMO | 1 | Valid values are A-Z and blank. |
| NAME ID | 2 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| ORIGINAL SSN - DEMO | 9 | Valid values are 001-01-0001 to 999-99-9999. |
| ORIGINATION BATCH ID | 23 | Valid values are 2 characters for Batch Type (#D = Sub/Unsub, PF = PLUS, or RB = Rebuild), 1 digit Cycle Year = 3, 6 characters for Direct Loan Federal School Code, 8 digits for current date in CCYYMMDD format, and 6 digits for current time in HHMMSS format. |
| ORIGINATION CHANGE BATCH ID | 23 | Valid values are 2 characters for Batch Type = #E, 1 digit Cycle Year = 3, 6 characters for Direct Loan Federal School Code, 8 digits for current date in CCYYMMDD format, and 6 digits for current time in HHMMSS format. |
| ORIGINATION REJECT CODES | 21 | Valid values: See Direct Loan Technical Reference. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| PARENT BORROWER'S ADDRESS CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| PARENT BORROWER'S ALIEN REGISTRATION # | 9 | Valid values are 000000001-999999999 and blank. |
| PARENT BORROWER'S CITIZENSHIP STATUS | 1 | Valid values are 1 = U.S. Citizen, 2 = Eligible Non-citizen, 3 = Ineligible Non-citizen and blank. |
| PARENT BORROWER'S CURRENT SSN | 9 | Valid values are 001-01-0001 to 999-99-9999. |
| PARENT BORROWER'S DATE OF BIRTH | 8 | Valid values are CCYYMMDD. |
| PARENT BORROWER'S DATE OF BIRTH CHG DATE | 8 | Valid values are CCYYMMDD. |
| PARENT BORROWER'S FIRST NAME | 12 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| PARENT BORROWER'S LAST NAME | 16 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| PARENT BORROWER'S LICENSE # | 20 | Valid values are 0-9, Uppercase A-Z, Space(s), - (Dash), * (Asterisk), and blank. |
| PARENT BORROWER'S LICENSE STATE | 2 | Valid values: See Direct Loan Technical Reference. |
| PARENT BORROWER'S LOAN DEFAULT/GRANT OVERPAYMENT | 1 | Valid values are Y=Yes, N=No and Z=Overridden by school. |
| PARENT BORROWER'S MIDDLE INITIAL | 1 | Valid values are A-Z and blank. |
| PARENT BORROWER'S PERMANENT ADDRESS | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PARENT BORROWER'S PERMANENT CITY | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PARENT BORROWER'S PERMANENT PHONE NUMBER | 10 | Valid values are 0000000000-9999999999 and blank. |
| PARENT BORROWER'S PERMANENT STATE | 2 | Valid values: See Direct Loan Technical Reference. |
| PARENT BORROWER'S PERMANENT ZIP CODE | 9 | Valid values are 000000000-999999999. |
| PARENT BORROWER'S SSN CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| PERMANENT ADDRESS - DEMO | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| PERMANENT ADDRESS CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| PERMANENT CITY - DEMO | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PERMANENT PHONE NUMBER - DEMO | 10 | Valid values are 0000000000 to 9999999999 and blank. |
| PERMANENT STATE - DEMO | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| PERMANENT ZIP CODE - DEMO | 9 | Valid values are 000000000 to 999999999 and blank. |
| PREVIOUS TRANSACTION | 2 | Valid values are 01-99. |
| PROGRAM OF STUDY | 10 | Text fields may include any alphanumeric character. You may also use all keyboard punctuation characters with the exception of underscore (_) and pipe (\|). Numeric fields may use any numeric value between -2,147,483,648 to 2,147,483,647. Date fields are eight characters in length and should be entered in CCYYMMDD format. Boolean field values are TRUE and FALSE. |
| PROGRAM YEAR | 4 | Valid value is 0203. |
| PROM NOTE ACCEPTED BATCH ID | 23 | Valid values are 2 characters for Batch Type = #A, #D, PF (#D and PF valid for Standard Origination schools only), 1 digit Cycle Year = 3, 6 characters for Direct Loan Federal School Code, 8 digits for current date in CCYYMMDD format, and 6 digits for current time in HHMMSS format. |
| PROM NOTE ACKNOWLEDGEMENT DATE | 8 | Valid values are CCYYMMDD. |
| PROM NOTE ID/MPN ID | 21 | Valid values are 9 characters for Student's Social Security number (001010001–999999999), 1 character for Loan Type (S = Subsidized, U = Unsubsidized, P = PLUS, M = Master), 2 digits for Program Year = 03, 6 characters for School Code (X00000 - X99999 where X = G or E), 3 digits for Loan Sequence Number = 001 – 999. |
| PROM NOTE MANIFEST BATCH ID | 23 | Valid values are 2 characters for Batch Type (#A = Manifest or RB = Rebuild), 1 digit Cycle Year = 3, 6 characters for Direct Loan Federal School Code, 8 digits for current date in CCYYMMDD format, and 6 digits for current time in HHMMSS format. |
| PROM NOTE MANIFEST DATE | 8 | Valid values are CCYYMMDD. |
| PROM NOTE PRINT DATE | 8 | Valid values are CCYYMMDD. |
| PROM NOTE PRINT INDICATOR | 1 | Valid values are S=LOC Print (Send to Student), R=LOC Print (Return to School), O=Onsite , Z =LOC Reprint, F=Offsite |
| PROM NOTE RECEIVED DATE | 8 | Valid values are CCYYMMDD. |
| PROM NOTE STATUS | 1 | Valid values are N = Not ready to Print, R = Ready To Print, P = Printed/Request to Print Sent to LOC, S = Signed and Returned, X = Pending, A = Accepted by LOC, E = Prom Note Error Received from LOC, M = Manifested, T = School assumes MPN Exists, or blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| RECORD SOURCE | 1 | Valid values are M = Manual Entry, I = ISIR Import, P = Packaging External Add Import, L = Direct Loan External Add Import, E = Pell External Add Import, Y = Prior Year Demographic Import, R = Direct Loan Rebuild Import, D = Demographic Data external import, O = Pell Originiation Ack - regular, W = Pell Originiation Ack - web, X = Pell YTD and blank. |
| RECORD SOURCE - DL | 1 | Valid values are M = Manual Entry, I = ISIR Import, P = Packaging Import, E = External Add Import, and R = Rebuild Import. |
| SCHOOL USE | 20 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| SSN CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| STUDENT'S LOAN DEFAULT/GRANT OVERPAYMENT | 1 | Valid values are Y=Yes, N=No and Z=Overridden by school. |
| STUDENT'S ORIGINAL SSN | 9 | Valid values are 001-01-0001 to 999-99-9999. |
| STUDENT'S STATE OF LEGAL RESIDENCE - DEMO | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| TRANS PAID ON | 2 | Valid values are 01-99 |
| TRANSACTION # | 2 | Valid values are 00-99. |
| TRANSMIT DATE | 8 | Valid values are CCYYMMDD. |
| TRANSMIT NUMBER | 2 | Valid values are 00-99 |
| UPDATE DATE | 8 | Valid values are CCYYMMDD. |
| UPDATE DATE (LOAN) | 8 | Valid values are CCYYMMDD. |
| UPDATE ID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| UPDATE ID (LOAN) | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| | | Brace), Space and Blank. |
| UPDATE TIME | 6 | Valid values are HHMMSS. |
| UPDATE TIME (LOAN) | 6 | Valid values are HHMMSS. |
| VERIFICATION STATUS CODE - DEMO | 1 | Valid values are V = Verified, W = Without documentation, and blank. |

# Query Fields

**Pell Module**

| FieldName | Length | ValidValues |
|---|---|---|
| ACADEMIC CALENDAR | 1 | Valid values are 1 = Non-standard terms, 2 = Quarters, 3 = Semesters, 4 = Trimesters, 5 = Clock Hours and 6 = Credit Hours w/o terms. |
| ACADEMIC MAJOR | 10 | Text fields may include any alphanumeric character. You may also use all keyboard punctuation characters with the exception of underscore (_) and pipe (\|). Numeric fields may use any numeric value between -2,147,483,648 to 2,147,483,647. Date fields are eight characters in length and should be entered in CCYYMMDD format. Boolean field values are TRUE and FALSE. |
| ACCEPTED DISBURSEMENT AMOUNT | 8 | Valid values are -4000.00-4000.00. |
| ACTION STATUS - DISBURSEMENT | 1 | Valid values are A = Accepted, B = Batched, E = Error and R = Ready. |
| ACTION STATUS - PELL DISBURSEMENT | 1 | Valid values are A = Accepted, C = Corrected, D = Duplicate and E = Error (Rejected). |
| ACTIVE TRANSACTION | 2 | Valid values are 01-99. |
| ACTIVE TRANSACTION DATE | 8 | Valid values are CCYYMMDD. |
| ACTIVE TRANSACTION ID | 8 | Valid values are A-Z, .(period), ' (apostrophe), - (dash) spaces(s) and blank. |
| ADD DATE | 8 | Valid values are CCYYMMDD. |
| ADD TIME | 6 | Valid values are HHMMSS. |
| ADD USERID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| ALIEN REGISTRATION # | 9 | Valid values are 000000001 to 999999999 and blank. |
| ATTENDING CAMPUS ID | 6 | Valid values are 000001-099999. |
| AWARD AMOUNT FOR ENTIRE YEAR | 8 | Valid values are 00000.00-04000.00. |
| CITIZENSHIP STATUS - DEMO | 1 | Valid values are 1 = U.S. Citizen, 2 = Eligible Non-citizen, 3 = Ineligible Non-citizen and blank. |
| CONCURRENT ENROLLMENT | 1 | Valid values are 1 = Yes 0 = No. |

## Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| COST OF ATTENDANCE | 5 | Valid values are 00000-99999. |
| CREDIT/CLOCK HOURS EXPECTED | 4 | Valid values are 0000-3120 Academic Calendar 5, 0000-0100 Academic Calendar 6 and blank. |
| CREDIT/CLOCK HOURS IN PRGMS. DEF. OF ACAD. YEAR | 4 | Valid values are 0900-3120 Academic Calendar 5, 0024-0100 Academic Calendar 6 and blank. |
| CURRENT SSN | 9 | Valid values are 001010001 to 999999999. |
| DATE OF BIRTH - DEMO | 8 | Valid values are CCYYMMDD. |
| DATE OF BIRTH CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| DEPENDENCY STATUS - DEMO | 1 | Valid values are I = Independent, D = Dependent and blank. |
| DISBURSEMENT BATCH ID | 26 | Valid values: See Technical Reference. |
| DISBURSEMENT COMMENTS | 100 | Valid values are: See Technical Reference. |
| DISBURSEMENT CROSS REFERENCE | 13 | Valid values any valid keyboard character. |
| DISBURSEMENT DATE | 8 | Valid values are CCYYMMDD. |
| DISBURSEMENT NUMBER | 2 | Valid values are 01-99. |
| DOCUMENT STATUS | 1 | Valid values are B = Documents still needed for both packaging and verification, C = All documents are satisfied (includes documents required for both packaging and verification), V = Documents still needed for verification, P = Documents still needed for packaging, O = Other documents needed but not required for packaging or verification, D=Documents received but still need to be reviewed, and Blank = Status Not Determined or no documents attached to record. |
| DRIVER'S LICENSE # | 20 | Valid values are 0-9, A-Z, spaces, -(dash), * (asterisk) and blank. |
| DRIVER'S LICENSE STATE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| E-MAIL ADDRESS | 50 | Valid values are 0 to 9, Uppercase A to Z, Lowercase a to z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |

## Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| EDFLAG10 (RESERVED FOR FUTURE USE) | 1 | Valid values are 1 = Yes 0 = No. |
| EDFLAG5 (RESERVED FOR FUTURE USE) | 1 | Valid values are 1 = Yes 0 = No. |
| EDFLAG6 (RESERVED FOR FUTURE USE) | 1 | Valid values are 1 = Yes 0 = No. |
| EDFLAG7 (RESERVED FOR FUTURE USE) | 1 | Valid values are 1 = Yes 0 = No. |
| EDFLAG8 (RESERVED FOR FUTURE USE) | 1 | Valid values are 1 = Yes 0 = No. |
| EDFLAG9 (RESERVED FOR FUTURE USE) | 1 | Valid values are 1 = Yes 0 = No. |
| EDITS/COMMENTS RETURNED BY PELL | 100 | Valid values are: See Technical Reference. |
| EFC - PELL | 5 | Valid values are 00000-03800. |
| ENROLLMENT DATE | 8 | Valid values are CCYYMMDD. |
| ENROLLMENT STATUS | 1 | Valid values are 1 = Full-time, 2 = 3/4 time, 3 = 1/2 time, 4 = Less than 1/2 time, 5 = Other and blank. |
| ESTIMATED DISBURSEMENT DATE 1 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 10 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 11 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 12 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 13 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 14 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 15 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 2 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 3 | 8 | Valid values are CCYYMMDD. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| ESTIMATED DISBURSEMENT DATE 4 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 5 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 6 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 7 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 8 | 8 | Valid values are CCYYMMDD. |
| ESTIMATED DISBURSEMENT DATE 9 | 8 | Valid values are CCYYMMDD. |
| FIRST NAME - DEMO | 12 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| HAS CORRECTION RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS DOCUMENT TRACKING RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS FAFSA RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS LOAN RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS NOTES RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS NSLDS RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS PACKAGING RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS PELL RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS VERIFICATION WORKSHEET RECORD | 1 | Valid values are Y = Yes and N = No. |
| INCARCERATED? | 1 | Valid values are Y = Yes, the student is incarcerated in a local institution, but is otherwise eligible, N = No, if student previously reported as incatcerated, but is not or is no longer and BLANK = Not incarcerated. |
| ISIR DL MPN FLAG | 1 | Valid values are A = Active, I = Inactive, C = Closed, N = No MPN on file, U = Unavailable, and blank. |
| LAST MAILED DATE | 8 | Valid values are CCYYMMDD. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| LAST NAME - DEMO | 16 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| LEGAL RESIDENCE DATE - DEMO | 6 | Valid values are 190001 to 200312 and Blank. |
| LETTER COUNT | 2 | Valid values are 0-9 and blank. |
| LOAN ENTRANCE INTERVIEW DATE? | 8 | Valid values are CCYYMMDD. |
| LOCAL ADDRESS | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| LOCAL ADDRESS CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| LOCAL CITY | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| LOCAL PHONE | 10 | Valid values are 0000000000 to 9999999999 and blank. |
| LOCAL STATE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| LOCAL ZIP CODE | 9 | Valid values are 000000000 to 999999999 and blank. |
| LOW TUITION AND FEES CODE | 1 | Valid values are 1 = $0, 2 = $1 to $216, 3 = $217 to $433, 4 = $434 to $649. |
| MIDDLE INITIAL - DEMO | 1 | Valid values are A-Z and blank. |
| NAME ID | 2 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| ORIGINAL NAME CODE | 2 | Valid values are A-Z, .(period), '(apostrophe), -(dash) and blank. |
| ORIGINAL SSN - DEMO | 9 | Valid values are 001-01-0001 to 999-99-9999. |
| ORIGINATION BATCH ID | 26 | Valid values: See Pell Technical Reference. |
| ORIGINATION CROSS REFERENCE | 13 | Valid values any valid keyboard character. |
| ORIGINATION ID | 23 | Valid values: See Technical Reference. |
| ORIGINATION PROCESS DATE | 8 | Valid values are CCYYMMDD. |

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# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| ORIGINATION STATUS | 1 | Valid values are N = Not Ready, R = Ready, B = Batched, A = Accepted, and E = Error. |
| PAY PERIOD START DATE | 8 | Valid values are CCYYMMDD. |
| PAYMENT METHODOLOGY | 1 | Valid values are 1 = Formula 1, 2 = Formula 2, 3 = Formula 3, 4 = Formula 4 and 5 = Formula 5 |
| PELL ACTION STATUS - ORIGINATION | 1 | Valid values are A = Accepted, C = Corrected, E = Error (Rejected), and D = Duplicate. |
| PELL ADD DATE | 8 | Valid values are CCYYMMDD. |
| PELL ADD ID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| PELL ADD TIME | 6 | Valid values are HHMMSS. |
| PELL ORIGINAL SSN | 9 | Valid values are 001010001-999999999. |
| PELL ORIGINATION SOURCE | 1 | Valid values are I = ISIR Import, E = External Add Import, M = Manual Entry, P = ISIR Import including Packaging Data, O = Pell Origination Ack - regular, W = Pell Origination Ack - web, and X = Pell YTD . |
| PELL PROCESSOR YTD TOTAL | 7 | Valid values are 0000.00-9999.99. |
| PELL UPDATE DATE | 8 | Valid values are CCYYMMDD. |
| PELL UPDATE ID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| PELL UPDATE TIME | 6 | Valid values are HHMMSS. |
| PERMANENT ADDRESS - DEMO | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PERMANENT ADDRESS CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| PERMANENT CITY - DEMO | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |

## Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| PERMANENT PHONE NUMBER - DEMO | 10 | Valid values are 0000000000 to 9999999999 and blank. |
| PERMANENT STATE - DEMO | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| PERMANENT ZIP CODE - DEMO | 9 | Valid values are 000000000 to 999999999 and blank. |
| POP | 1 | Valid values are 1 = Yes 0 = No. |
| PREVIOUS TRANSACTION | 2 | Valid values are 01-99. |
| PROGRAM OF STUDY | 10 | Text fields may include any alphanumeric character. You may also use all keyboard punctuation characters with the exception of underscore (_) and pipe (\|). Numeric fields may use any numeric value between -2,147,483,648 to 2,147,483,647. Date fields are eight characters in length and should be entered in CCYYMMDD format. Boolean field values are TRUE and FALSE. |
| RECORD SOURCE | 1 | Valid values are M = Manual Entry, I = ISIR Import, P = Packaging External Add Import, L = Direct Loan External Add Import, E = Pell External Add Import, Y = Prior Year Demographic Import, R = Direct Loan Rebuild Import, D = Demographic Data external import, O = Pell Originiation Ack - regular, W = Pell Originiation Ack - web, X = Pell YTD and blank. |
| REPORTING CAMPUS ID | 6 | Valid values are 000001-099999. |
| SAR C FLAG - PELL | 1 | Valid values are Y=yes and blank. |
| SCHEDULED FEDERAL PELL GRANT | 8 | Valid values are 00000.00-04000.00. |
| SCHOOL INTERNAL SEQUENCE NUMBER | 3 | Valid values are A-Z, 0-9. |
| SCHOOL USE | 20 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| SECONDARY EFC CODE | 1 | Valid values are O = Award previously based on Secondary EFC, S = Award based on Secondary EFC and blank. |
| SHARED SAR ID | 1 | Valid values are 1 = Yes 0 = No. |
| SSN CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| STUDENT'S STATE OF LEGAL RESIDENCE - DEMO | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |

# *Query Fields*

| FieldName | Length | ValidValues |
|---|---|---|
| SUBMITTED | 8 | Valid values are -4000.00-4000.00. |
| TOTAL PAYMENT CEILING | 8 | Valid values are 00000.00-04000.00. |
| TRANS PAID ON | 2 | Valid values are 01-99 |
| TRANSACTION # | 2 | Valid values are 00-99. |
| TRANSACTION NUMBER - PELL | 2 | Valid values are 01-99. |
| UPDATE DATE | 8 | Valid values are CCYYMMDD. |
| UPDATE ID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| UPDATE TIME | 6 | Valid values are HHMMSS. |
| VERIFICATION STATUS CODE | 1 | Valid values are V = Verified, W = Without documentation, and blank. |
| VERIFICATION STATUS CODE - DEMO | 1 | Valid values are V = Verified, W = Without documentation, and blank. |
| VERIFICATION W STATUS | 1 | Valid values are 1 = Yes 0 = No. |
| WEEKS IN PROGRAMS DEFINITION OF ACADADEMIC YEAR | 2 | Valid values are 30-78 or blank. |
| WEEKS USED TO CALCULATE PAYMENT | 2 | Valid values are 00-78 or blank. |

# Query Fields

## *Packaging Module*

| FieldName | Length | ValidValues |
|---|---|---|
| ACADEMIC YEAR PROFILE | 4 | Valid values are A-Z and 0-9. |
| ACTIVE TRANSACTION | 2 | Valid values are 01-99. |
| ACTIVE TRANSACTION DATE | 8 | Valid values are CCYYMMDD. |
| ACTIVE TRANSACTION ID | 8 | Valid values are A-Z, .(period), ' (apostrophe), - (dash) spaces(s) and blank. |
| ADD DATE | 8 | Valid values are CCYYMMDD. |
| ADD TIME | 6 | Valid values are HHMMSS. |
| ADD USERID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| AGGREGATE PERKINS LOAN AMOUNT | 6 | Valid values are 000000 to 999999. |
| AGGREGATE SUBSIDIZED LOAN AMOUNT | 6 | Valid values are 000000 to 999999. |
| AGGREGATE UNSUBSIDIZED LOAN AMOUNT | 6 | Valid values are 000000 to 999999. |
| ALIEN REGISTRATION # | 9 | Valid values are 000000001 to 999999999 and blank. |
| AMOUNT OF PELL | 5 | Valid values are 00000-99999. |
| APPLICATION RECEIPT DATE | 8 | Valid values are CCYYMMDD. |
| AUTO ZERO EFC | 1 | Valid values are Y=Yes and blank. |
| AWARD LETTER | 1 | Valid values are TRUE=Yes and FALSE=No. |
| AWARD LETTER MAILED DATE | 8 | Valid values are CCYYMMDD. |
| AWARD LETTER RECEIVED DATE | 8 | Valid values are CCYYMMDD. |
| AWARD LETTER SENT COUNT | 2 | Valid values are 01-99 and blank. |

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## Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| BORROWER BASED | 1 | Valid values are TRUE=Yes and FALSE=No. |
| BUDGET AMOUNT | 6 | Valid values are 000000-999999. |
| BUDGET CODE | 4 | Valid values are A-Z, 0-9, +(plus sign), -(dash), *(asterisk), #(number sign), .(period), and space. |
| BUDGET TITLE | 50 | Valid values are any valid keyboard character. |
| CITIZENSHIP STATUS - DEMO | 1 | Valid values are 1 = U.S. Citizen, 2 = Eligible Non-citizen, 3 = Ineligible Non-citizen and blank. |
| CURRENT SSN | 9 | Valid values are 001010001 to 999999999. |
| DATE OF BIRTH - DEMO | 8 | Valid values are CCYYMMDD. |
| DATE OF BIRTH CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| DATE READY FOR PACKAGING | 8 | Valid values are CCYYMMDD. |
| DEFAULT STATUS | 1 | Valid Values are Y=Yes, N=No, Z=Override, and blank. |
| DEGREE | 1 | Valid values are TRUE=Yes and FALSE=No. |
| DEPENDENCY STATUS - DEMO | 1 | Valid values are I = Independent, D = Dependent and blank. |
| DIRECT LOAN PLUS | 1 | Valid values are TRUE=Yes and FALSE=No. |
| DIRECT LOAN SUBSIDIZED | 1 | Valid values are TRUE=Yes and FALSE=No. |
| DIRECT LOAN UNSUBSIDIZED | 1 | Valid values are TRUE=Yes and FALSE=No. |
| DOCUMENT STATUS | 1 | Valid values are B = Documents still needed for both packaging and verification, C = All documents are satisfied (includes documents required for both packaging and verification), V = Documents still needed for verification, P = Documents still needed for packaging, O = Other documents needed but not required for packaging or verification, D=Documents received but still need to be reviewed, and Blank = Status Not Determined or no documents attached to record. |
| DRIVER'S LICENSE # | 20 | Valid values are 0-9, A-Z, spaces, -(dash), * (asterisk) and blank. |
| DRIVER'S LICENSE STATE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| E-MAIL ADDRESS | 50 | Valid values are 0 to 9, Uppercase A to Z, Lowercase a to z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| EFC - PACKAGING | 5 | Valid values are 00000 - 99999. |
| ENROLLMENT STATUS - PACKAGING | 15 | Valid values are FULL TIME, 3/4 TIME, 1/2 TIME, < 1/2 TIME, and NOT ENROLLED. |
| ESTIMATED PELL GRANT | 5 | Valid values are 00000-99999. |
| EXPORT TO EXTERNAL SYSTEM | 1 | Valid values are TRUE=Yes and FALSE=No. |
| FIRST NAME - DEMO | 12 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| FUND AID TYPE | 1 | Valid values E = Supplemental Educational Opportunity Grant (SEOG), F = Federal Pell Grant, G = Grant, R = Grant, Non-need Based, K = Federal Perkins Loan, N = Non-Need Based Loan (NNB), L = Other Need Based Loan (NB), S = Direct Subsidized Loan (Sub), U = Direct Unsubsidized (Unsub Non-need Based), D = Direct Unsubsidized Loan (Unsub, Need Based), P = Federal Parent Loan for Undergraduate Students (PLUS), O = Outside Resources, V = Chapter 30 VA Benefits/Americorps, W = Federal Work-Study (FWS), and Y = Other Work-Study. |
| FUND CALCULATED VALUE | 5 | Valid values are 00000-99999. |
| FUND CODE | 8 | Valid values are A-Z, 0-9, +(plus sign), -(dash), *(asterisk), #(number sign), .(period), and blank (spaces). |
| FUND CURRENT TOTAL | 5 | Valid values are 00000-99999. |
| FUND DECISION TO ACCEPT | 1 | Valid values are A=Accept, D=Decline, O = Offered and S=Suspend. |
| FUND PREVIOUS TOTAL | 5 | Valid values are 00000-99999. |
| GRADE LEVEL IN COLLEGE - PACKAGING | 1 | Valid values are 0 = 1st year, never attended college, 1 = 1st year, attended college before, 2 = 2nd year/sophomore, 3 = 3rd year/junior, 4 = 4th year/senior, 5 = 5th year/other undergraduate, 6 = 1st year graduate/professional, 7 = Continuing graduate/professional, and Blank. |
| HAS CORRECTION RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS DOCUMENT TRACKING RECORD | 1 | Valid values are Y = Yes and N = No. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| HAS FAFSA RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS LOAN RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS NOTES RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS NSLDS RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS PACKAGING RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS PELL RECORD | 1 | Valid values are Y = Yes and N = No. |
| HAS VERIFICATION WORKSHEET RECORD | 1 | Valid values are Y = Yes and N = No. |
| HOUSING PLANS | 1 | Valid values are 1 = on-campus, 2 = off-campus, 3 = with parents, and Blank. |
| INTERESTED IN EMPLOYMENT | 1 | Valid values are Y=Yes and N=No. |
| INTERESTED IN STUDENT LOANS | 1 | Valid values are Y=Yes and N=No. |
| ISIR DL MPN FLAG | 1 | Valid values are A = Active, I = Inactive, C = Closed, N = No MPN on file, U = Unavailable, and blank. |
| LAST MAILED DATE | 8 | Valid values are CCYYMMDD. |
| LAST NAME - DEMO | 16 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| LEGAL RESIDENCE DATE - DEMO | 6 | Valid values are 190001 to 200312 and Blank. |
| LETTER COUNT | 2 | Valid values are 0-9 and blank. |
| LOAN ENTRANCE INTERVIEW DATE? | 8 | Valid values are CCYYMMDD. |
| LOCAL ADDRESS | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| LOCAL ADDRESS CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| LOCAL CITY | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| LOCAL PHONE | 10 | Valid values are 0000000000 to 9999999999 and blank. |
| LOCAL STATE | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| LOCAL ZIP CODE | 9 | Valid values are 000000000 to 999999999 and blank. |
| LOW TUITION | 1 | Valid values are 1 = $0, 2 = $1 to $216, 3 = $217 to $433, 4 = $434 to $649. |
| METHODOLOGY CODE | 4 | Valid values are A-Z and 0-9. |
| MIDDLE INITIAL - DEMO | 1 | Valid values are A-Z and blank. |
| NAME ID | 2 | Valid values are 0 to 9, Uppercase A to Z, Space(s), . (period), ' (apostrophe), - (dash), and Blank. |
| ORIGINAL SSN | 9 | Valid values are 001010001 to 999999999. |
| ORIGINAL SSN - DEMO | 9 | Valid values are 001-01-0001 to 999-99-9999. |
| PACKAGED DATE | 8 | Valid values are CCYYMMDD. |
| PACKAGING ADD DATE | 8 | Valid values are CCYYMMDD. |
| PACKAGING RECORD SOURCE | 1 | Valid values are E=External Import, M=Manual Record and I=ISIR Import. |
| PACKAGING RESULTS | 1 | Valid values are A = Any part of the Packaging Results accepted, D = Package Totally Declined, O = Offered, S = Suspend, and blank |
| PACKAGING STATUS | 1 | Valid values are P = Packaged, R = Ready to Package, M = Manually Adjusted Package, N = Not Ready to Package, U = Unpackaged and H = Handpackaged. |
| PARENT CONTRIBUTION | 5 | Valid values are 00000-99999. |
| PARENTS' STATE OF LEGAL RESIDENCE - PACKAGING | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference |
| PELL COA | 5 | Valid values are 00000 to 99999. |
| PELL EFC | 5 | Valid values are 00000-99999. |
| PELL ELIGIBLE FLAG | 1 | Valid values are TRUE = Yes and FALSE = No. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| PERMANENT ADDRESS - DEMO | 35 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PERMANENT ADDRESS CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| PERMANENT CITY - DEMO | 16 | Valid values are 0-9, A-Z, . (period), ' (apostrophe), - (dash), , (comma), # (pound), @ (at sign), &, (ampersand), % (percent), / (forward slash), spaces(s) and blank. |
| PERMANENT PHONE NUMBER - DEMO | 10 | Valid values are 0000000000 to 9999999999 and blank. |
| PERMANENT STATE - DEMO | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| PERMANENT ZIP CODE - DEMO | 9 | Valid values are 000000000 to 999999999 and blank. |
| PREVIOUS TRANSACTION | 2 | Valid values are 01-99. |
| PRINT LETTER IN NEXT BATCH? | 1 | Valid values are TRUE=Yes and FALSE=No. |
| PROCESS DATE | 8 | Valid values are CCYYMMDD. |
| PROGRAM OF STUDY | 10 | Text fields may include any alphanumeric character. You may also use all keyboard punctuation characters with the exception of underscore (_) and pipe (\|). Numeric fields may use any numeric value between -2,147,483,648 to 2,147,483,647. Date fields are eight characters in length and should be entered in CCYYMMDD format. Boolean field values are TRUE and FALSE. |
| RECORD SOURCE | 1 | Valid values are M = Manual Entry, I = ISIR Import, P = Packaging External Add Import, L = Direct Loan External Add Import, E = Pell External Add Import, Y = Prior Year Demographic Import, R = Direct Loan Rebuild Import, D = Demographic Data external import, O = Pell Originiation Ack - regular, W = Pell Originiation Ack - web, X = Pell YTD and blank. |
| REMAINING NEED | 6 | Valid values are -999999 to 999999. |
| REMAINING NEED < 0 | 1 | Valid values are Y = Remaining Need less than 0, N = Remaining Need greater than 0 or blank. |
| SATISFACTORY ACADEMIC PROGRESS | 2 | Valid values are A-Z, 0-9, +(plus sign), -(dash), *(asterisk), #(number sign), .(period), %(percent), <(less than), and >(greater than). |
| SCHOOL USE | 20 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), _ (Underscore), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), ' (Apostrophe), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| SIMPLIFIED NEEDS | 1 | Valid values are TRUE=Yes and FALSE=No. |

# Query Fields

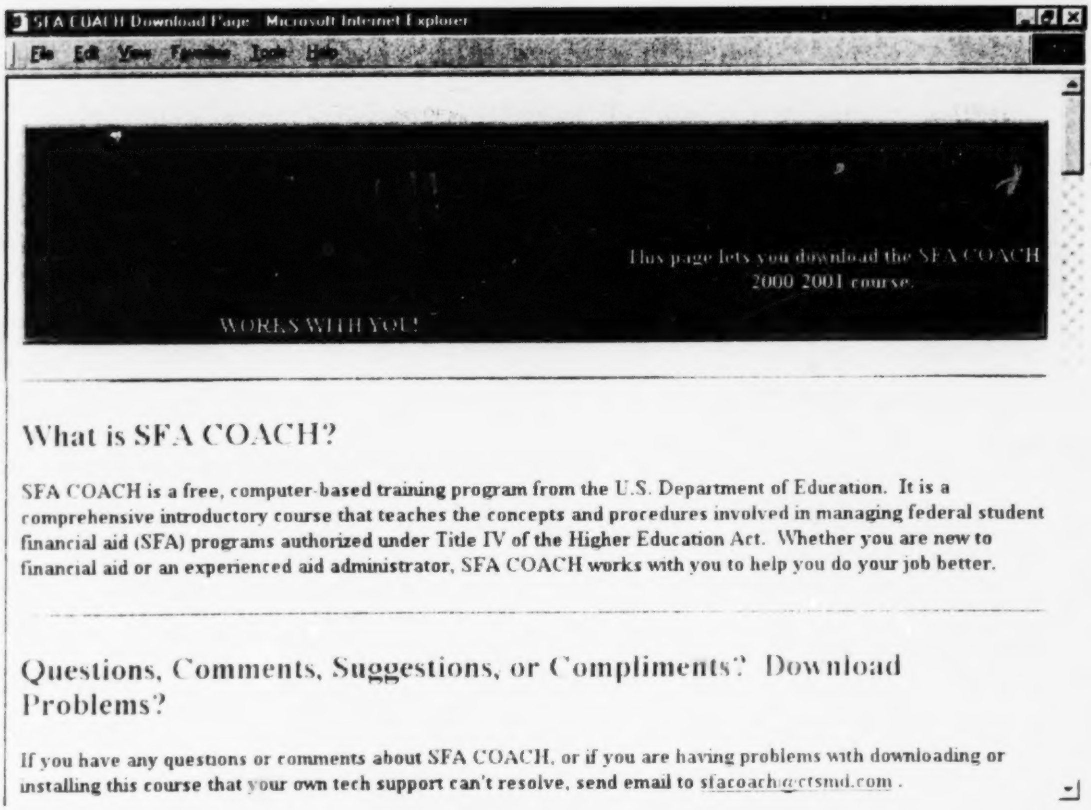
| FieldName | Length | ValidValues |
|---|---|---|
| SSN CHANGE DATE | 8 | Valid values are CCYYMMDD. |
| STUDENT'S STATE OF LEGAL RESIDENCE - DEMO | 2 | Valid values: See State / Country / Jurisdiction Table in EDE Technical Reference. |
| TERM DESCRIPTION | 8 | Valid values are A-Z, 0-9, +, -, *, #, ., ', and spaces. |
| TERM NUMBER | 1 | Valid values are 1 = 1st Term, 2 = 2nd Term, 3 = 3rd Term, 4 = 4th Term, 5 = 5th Term. |
| TOTAL INCOME | 8 | Valid values are -9999999 to 9999999. |
| TRANS PAID ON | 2 | Valid values are 01-99 |
| TRANSACTION # | 2 | Valid values are 00-99. |
| UNMET NEED AMOUNT | 6 | Valid values are -999999 to 999999. |
| UPDATE DATE | 8 | Valid values are CCYYMMDD. |
| UPDATE ID | 8 | Valid values are 0 to 9, Uppercase A to Z, ` (Accent), ! (Exclamation), @ (At), # (Number), $ (Dollar), % (Percent), ^ (Caret), & (Ampersand), * (Asterisk), ( (Open Parenthesis), ) (Closed Parenthesis), - (Dash), = (Equal), \ (Backward Slash), / (Forward Slash), + (Plus), ~ (Tilde), : (Colon), ; (Semicolon), " (Quote), < (Less Than), > (Greater Than), ? (Question Mark), , (Comma), . (Period), [ (Open Bracket), ] (Closed Bracket), { (Open Brace), } (Closed Brace), Space and Blank. |
| UPDATE TIME | 6 | Valid values are HHMMSS. |
| USER DEFINED FORMULA 1 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 10 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 11 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 12 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 2 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 3 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 4 | 8 | Valid values are 00000000 to 99999999. |

# Query Fields

| FieldName | Length | ValidValues |
|---|---|---|
| USER DEFINED FORMULA 5 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 6 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 7 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 8 | 8 | Valid values are 00000000 to 99999999. |
| USER DEFINED FORMULA 9 | 8 | Valid values are 00000000 to 99999999. |
| VERIFICATION STATUS CODE - DEMO | 1 | Valid values are V = Verified, W = Without documentation, and blank. |
| VERIFICATION TYPE | 2 | Valid values are Y, N and blank. |

# Appendix E

# Web Site Screens

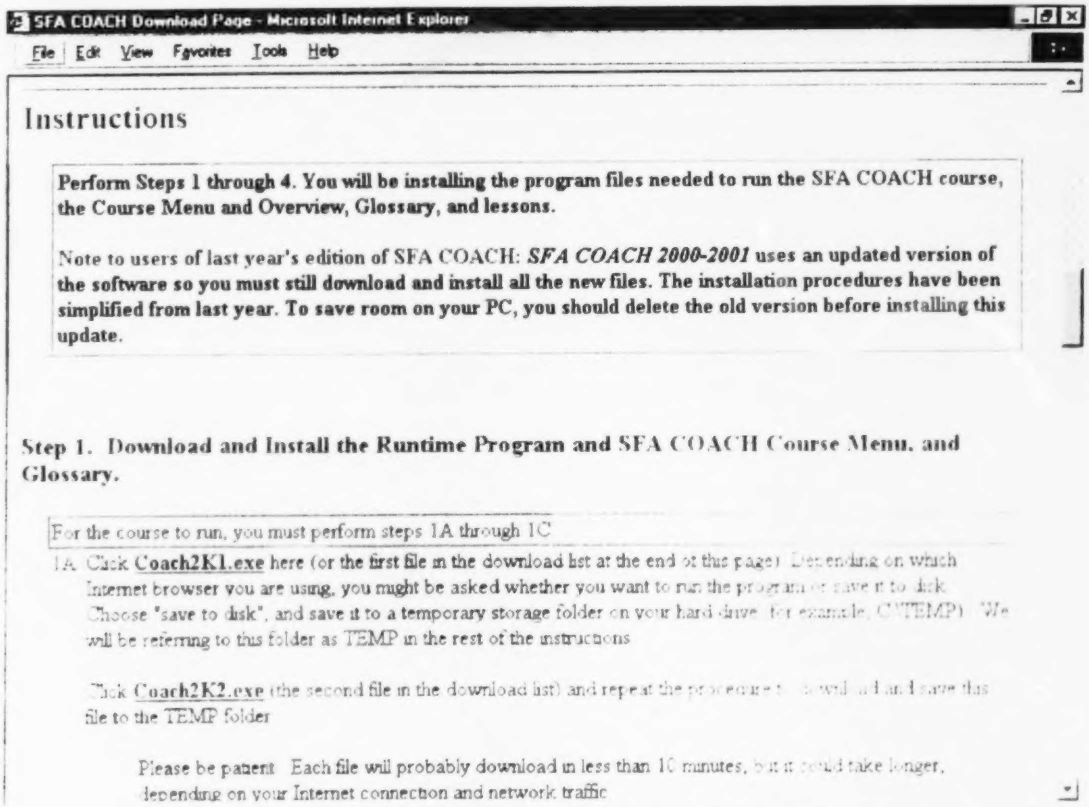

SFA COACH Download Page - Microsoft Internet Explorer
File
Edit
View
Favorites
Tools
Help
WORKS WITH YOU!
This page lets you download the SFA COACH 2000-2001 course.

## What is SFA COACH?

SFA COACH is a free, computer-based training program from the U.S. Department of Education. It is a comprehensive introductory course that teaches the concepts and procedures involved in managing federal student financial aid (SFA) programs authorized under Title IV of the Higher Education Act. Whether you are new to financial aid or an experienced aid administrator, SFA COACH works with you to help you do your job better.

## Questions, Comments, Suggestions, or Compliments? Download Problems?

If you have any questions or comments about SFA COACH, or if you are having problems with downloading or installing this course that your own tech support can't resolve, send email to sfacoach@ctsmd.com .


SFA COACH Download Page - Microsoft Internet Explorer
File
Edit
View
Favorites
Tools
Help

## Instructions

**Perform Steps 1 through 4. You will be installing the program files needed to run the SFA COACH course, the Course Menu and Overview, Glossary, and lessons.**

Note to users of last year's edition of SFA COACH: ***SFA COACH 2000-2001*** **uses an updated version of the software so you must still download and install all the new files. The installation procedures have been simplified from last year. To save room on your PC, you should delete the old version before installing this update.**

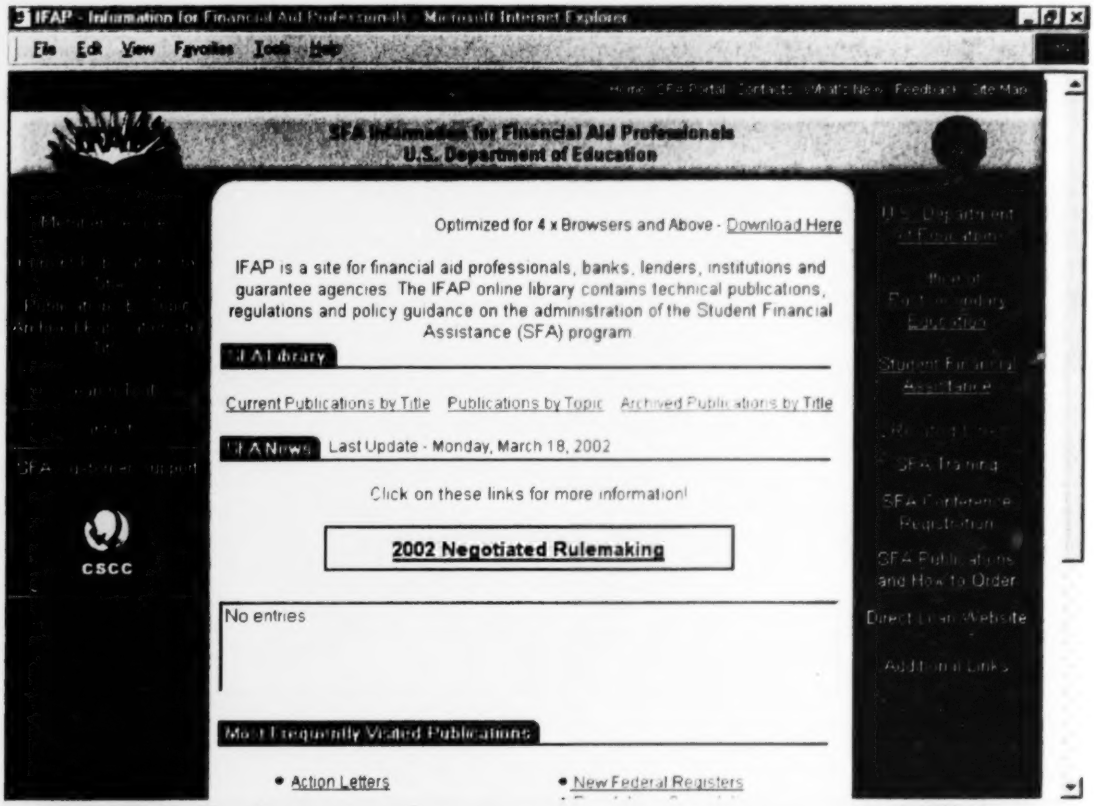
### Step 1. Download and Install the Runtime Program and SFA COACH Course Menu, and Glossary.

For the course to run, you must perform steps 1A through 1C

1A. Click **Coach2K1.exe** here (or the first file in the download list at the end of this page). Depending on which Internet browser you are using, you might be asked whether you want to run the program or save it to disk. Choose "save to disk", and save it to a temporary storage folder on your hard drive (for example, C:\TEMP). We will be referring to this folder as TEMP in the rest of the instructions.

Click **Coach2K2.exe** (the second file in the download list) and repeat the procedure to download and save this file to the TEMP folder.

Please be patient. Each file will probably download in less than 10 minutes, but it could take longer, depending on your Internet connection and network traffic.


IFAP - Information for Financial Aid Professionals - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Home SFA Portal Contacts What's New Feedback Site Map
SFA Information for Financial Aid Professionals
U.S. Department of Education
CSCC
SFA Customer Support
U.S. Department of Education
Student Financial Assistance
SFA Training
SFA Conference Registration
SFA Publications and How to Order
Direct Loan Website
Additional Links

Optimized for 4 x Browsers and Above - Download Here

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SFA Library

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SFA News Last Update - Monday, March 18, 2002

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2002 Negotiated Rulemaking

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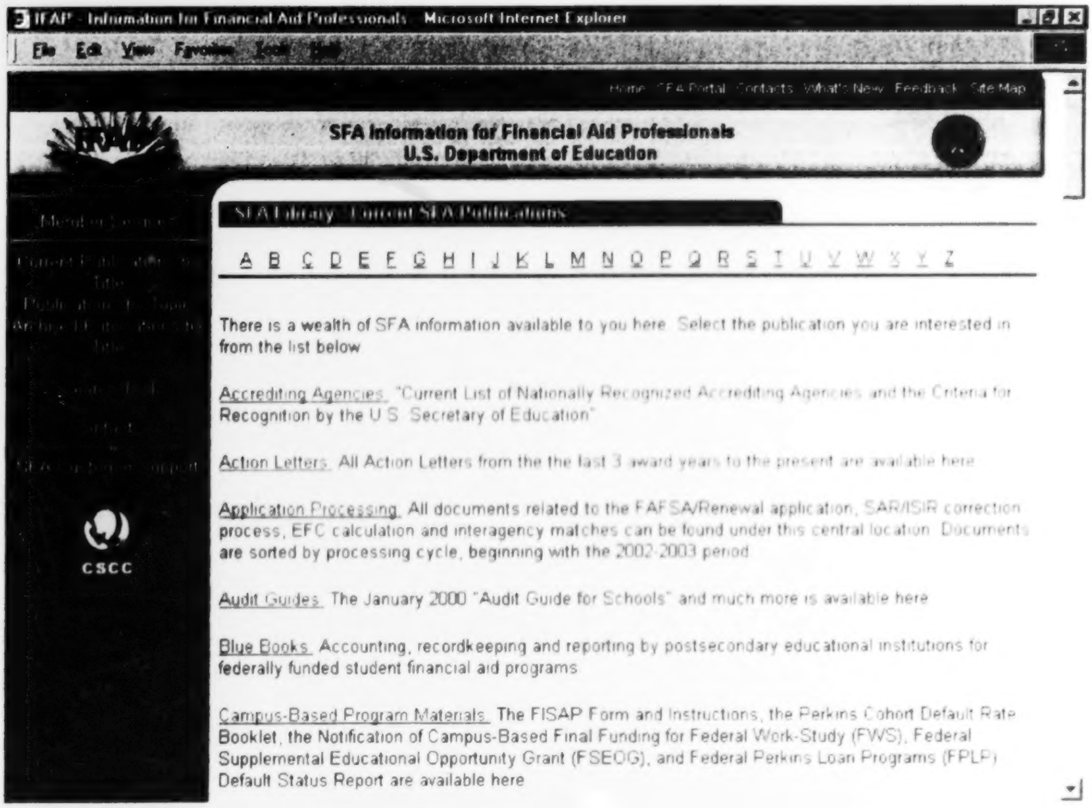
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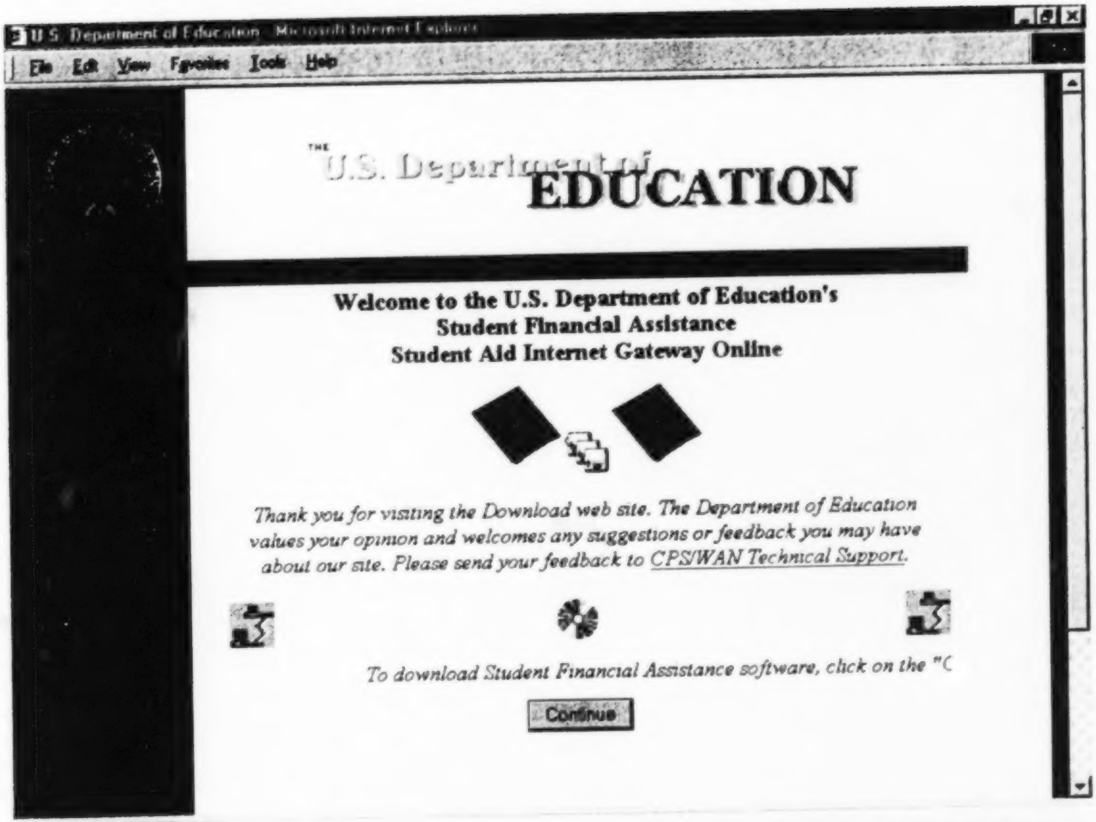
Application Processing All documents related to the FAFSA/Renewal application, SAR/ISIR correction process, EFC calculation and interagency matches can be found under this central location Documents are sorted by processing cycle, beginning with the 2002-2003 period

Audit Guides The January 2000 "Audit Guide for Schools" and much more is available here

Blue Books Accounting, recordkeeping and reporting by postsecondary educational institutions for federally funded student financial aid programs

Campus-Based Program Materials The FISAP Form and Instructions, the Perkins Cohort Default Rate Booklet, the Notification of Campus-Based Final Funding for Federal Work-Study (FWS), Federal Supplemental Educational Opportunity Grant (FSEOG), and Federal Perkins Loan Programs (FPLP) Default Status Report are available here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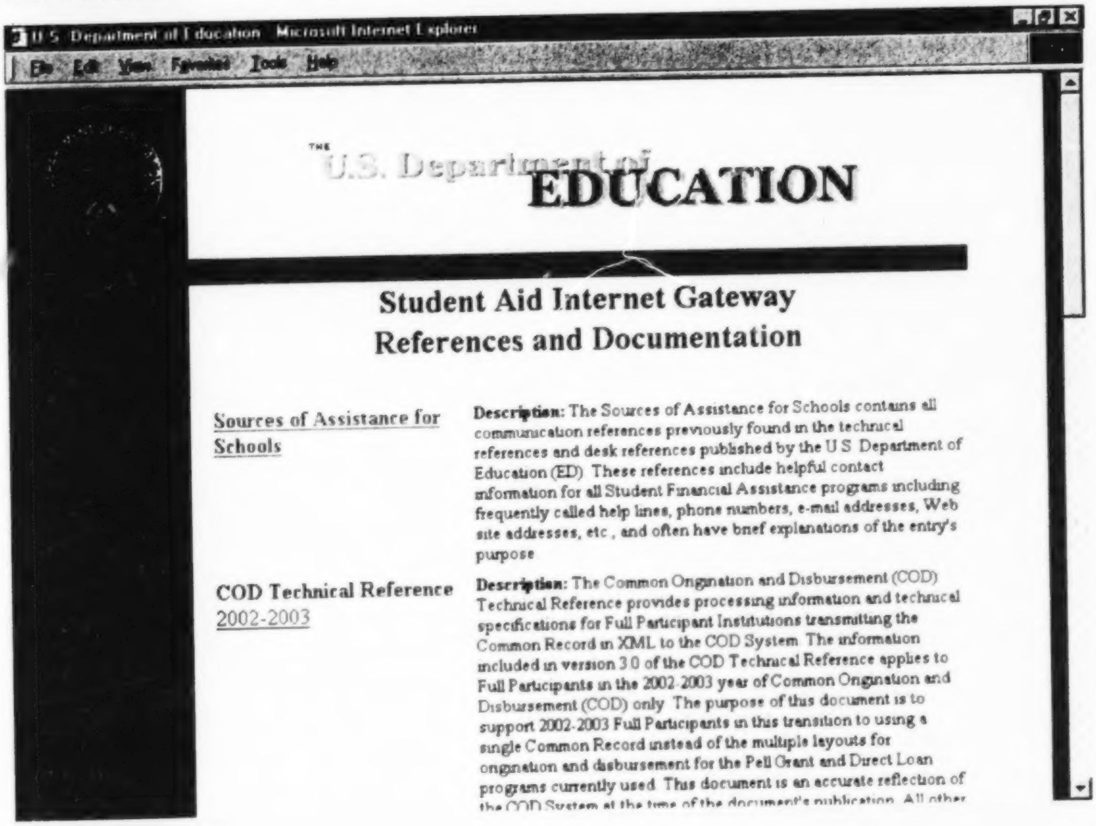
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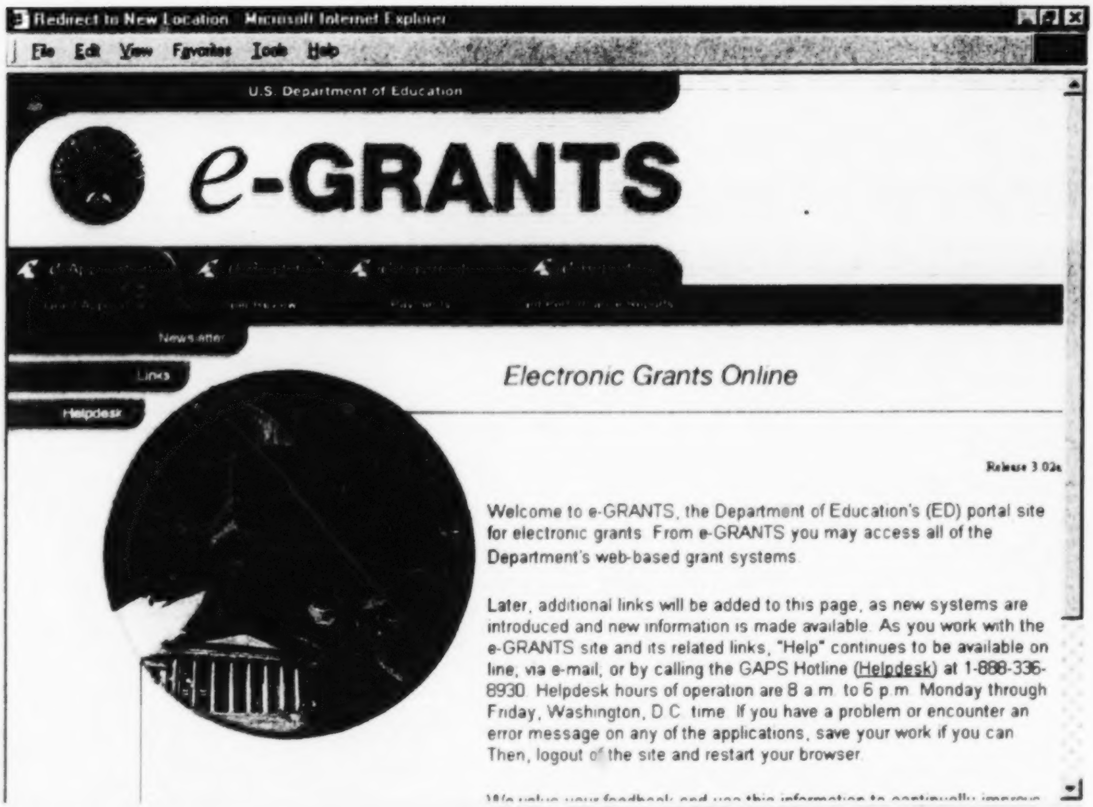
**Student Aid Internet Gateway**
**References and Documentation**

| | |
|---|---|
| Sources of Assistance for Schools | **Description:** The Sources of Assistance for Schools contains all communication references previously found in the technical references and desk references published by the U.S. Department of Education (ED). These references include helpful contact information for all Student Financial Assistance programs including frequently called help lines, phone numbers, e-mail addresses, Web site addresses, etc., and often have brief explanations of the entry's purpose. |
| **COD Technical Reference** 2002-2003 | **Description:** The Common Origination and Disbursement (COD) Technical Reference provides processing information and technical specifications for Full Participant Institutions transmitting the Common Record in XML to the COD System. The information included in version 3.0 of the COD Technical Reference applies to Full Participants in the 2002-2003 year of Common Origination and Disbursement (COD) only. The purpose of this document is to support 2002-2003 Full Participants in this transition to using a single Common Record instead of the multiple layouts for origination and disbursement for the Pell Grant and Direct Loan programs currently used. This document is an accurate reflection of the COD System at the time of the document's publication. All other |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e-GRANTS
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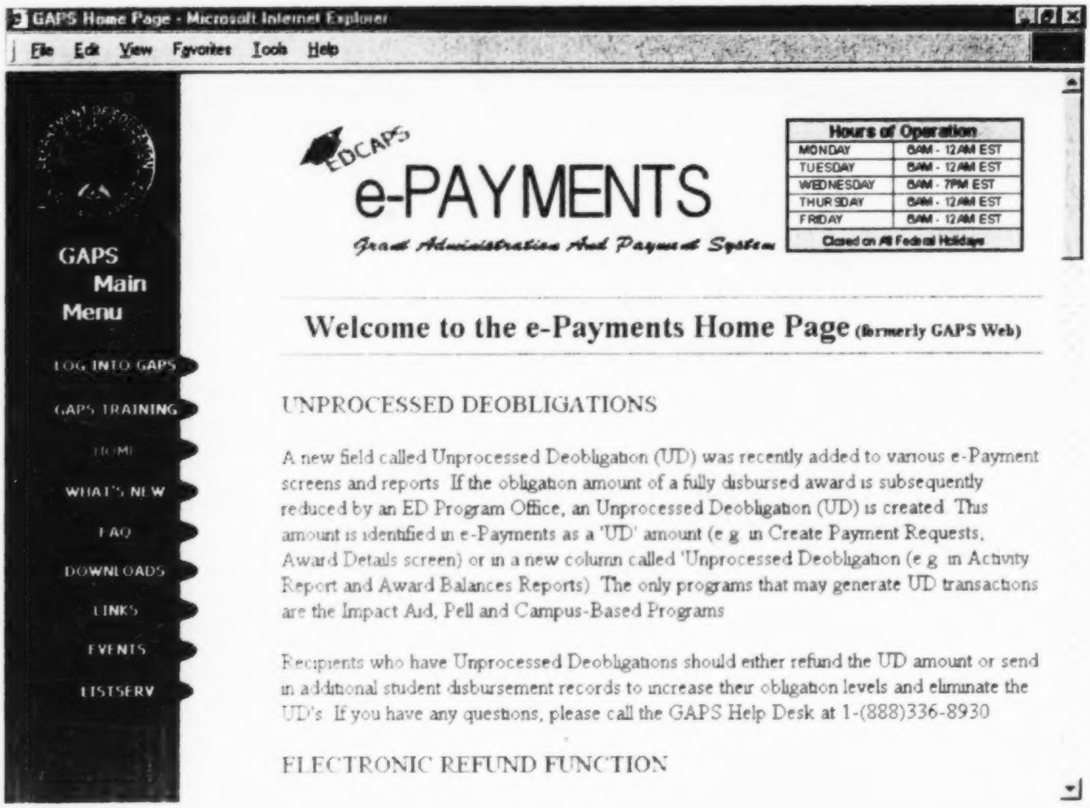
Electronic Grants Online

Release 3.02a

Welcome to e-GRANTS, the Department of Education's (ED) portal site for electronic grants. From e-GRANTS you may access all of the Department's web-based grant systems.

Later, additional links will be added to this page, as new systems are introduced and new information is made available. As you work with the e-GRANTS site and its related links, "Help" continues to be available on line, via e-mail, or by calling the GAPS Hotline (Helpdesk) at 1-888-336-8930. Helpdesk hours of operation are 8 a.m. to 6 p.m. Monday through Friday, Washington, D.C. time. If you have a problem or encounter an error message on any of the applications, save your work if you can. Then, logout of the site and restart your browser.

We value your feedback and use this information to continually improve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| Closed on All Federal Holidays | |

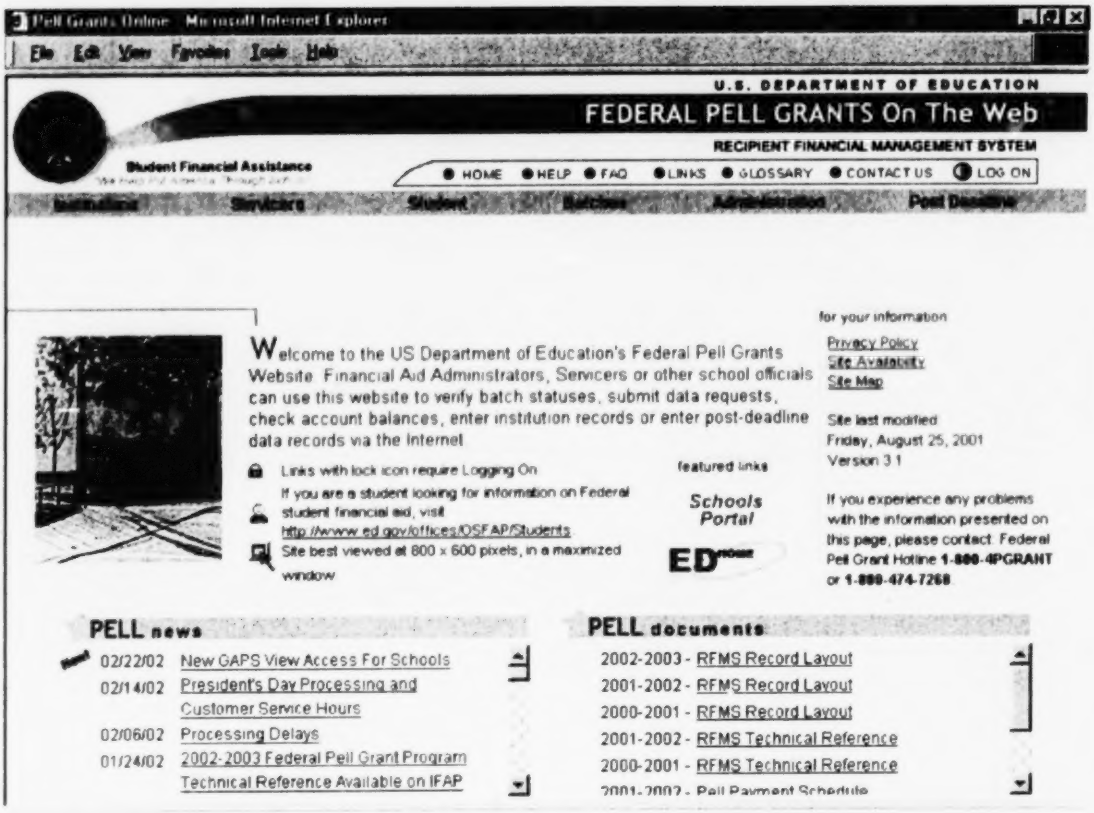
Welcome to the e-Payments Home Page (formerly GAPS Web)

UNPROCESSED DEOBLIGATIONS

A new field called Unprocessed Deobligation (UD) was recently added to various e-Payment screens and reports. If the obligation amount of a fully disbursed award is subsequently reduced by an ED Program Office, an Unprocessed Deobligation (UD) is created. This amount is identified in e-Payments as a 'UD' amount (e.g. in Create Payment Requests, Award Details screen) or in a new column called 'Unprocessed Deobligation (e.g. in Activity Report and Award Balances Reports). The only programs that may generate UD transactions are the Impact Aid, Pell and Campus-Based Programs.

Recipients who have Unprocessed Deobligations should either refund the UD amount or send in additional student disbursement records to increase their obligation levels and eliminate the UD's. If you have any questions, please call the GAPS Help Desk at 1-(888)336-8930.

ELECTRONIC REFUND FUNCTION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Welcome to the US Department of Education's Federal Pell Grants Website. Financial Aid Administrators, Servicers or other school officials can use this website to verify batch statuses, submit data requests, check account balances, enter institution records or enter post-deadline data records via the Internet.

Links with lock icon require Logging On

If you are a student looking for information on Federal student financial aid, visit http://www.ed.gov/offices/OSFAP/Students

Site best viewed at 800 x 600 pixels, in a maximized window

Site last modified
Friday, August 25, 2001
Version 3.1

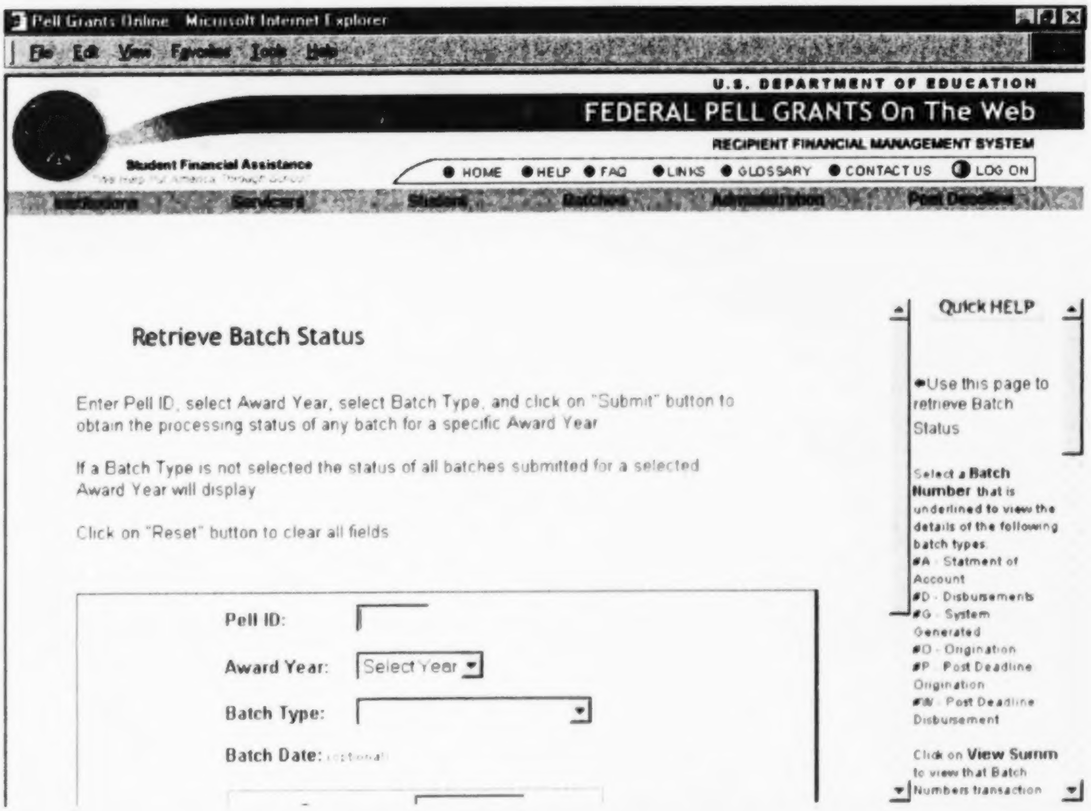
If you experience any problems with the information presented on this page, please contact Federal Pell Grant Hotline **1-800-4PGRANT** or **1-800-474-7268**.

**PELL news**

| | |
|---|---|
| 02/22/02 | New GAPS View Access For Schools |
| 02/14/02 | President's Day Processing and Customer Service Hours |
| 02/06/02 | Processing Delays |
| 01/24/02 | 2002-2003 Federal Pell Grant Program Technical Reference Available on IFAP |

**PELL documents**

2002-2003 - RFMS Record Layout
2001-2002 - RFMS Record Layout
2000-2001 - RFMS Record Layout
2001-2002 - RFMS Technical Reference
2000-2001 - RFMS Technical Reference
2001-2002 - Pell Payment Schedule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Retrieve Batch Status

Enter Pell ID, select Award Year, select Batch Type, and click on "Submit" button to obtain the processing status of any batch for a specific Award Year.

If a Batch Type is not selected the status of all batches submitted for a selected Award Year will display.

Click on "Reset" button to clear all fields.

Pell ID:
Award Year: Select Year
Batch Type:
Batch Date: (optional)

Use this page to retrieve Batch Status

Select a **Batch Number** that is underlined to view the details of the following batch types:
#A - Statment of Account
#D - Disbursements
#G - System Generated
#O - Origination
#P - Post Deadline Origination
#W - Post Deadline Disbursement

Click on **View Summ** to view that Batch Numbers transaction

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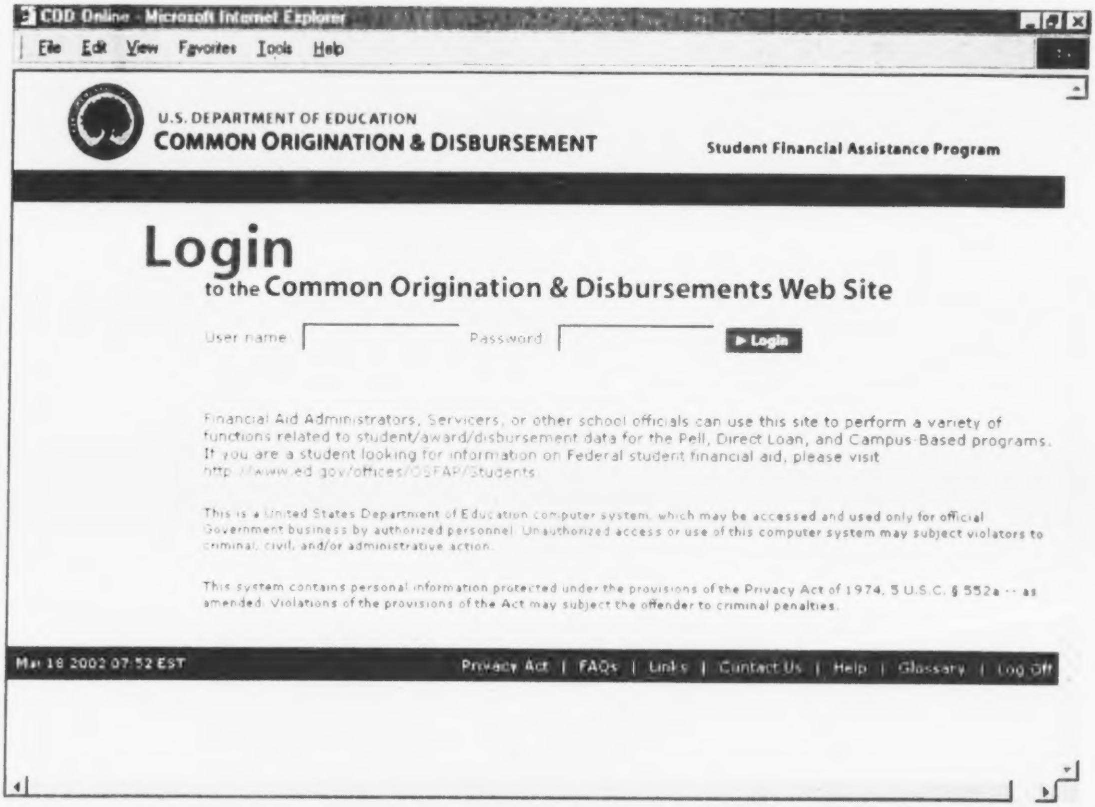
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U.S. DEPARTMENT OF EDUCATION
COMMON ORIGINATION & DISBURSEMENT
Student Financial Assistance Program

# Login
## to the Common Origination & Disbursements Web Site

User name ☐ Password ☐ ▶ Login

Financial Aid Administrators, Servicers, or other school officials can use this site to perform a variety of functions related to student/award/disbursement data for the Pell, Direct Loan, and Campus-Based programs. If you are a student looking for information on Federal student financial aid, please visit http://www.ed.gov/offices/OSFAP/Students

This is a United States Department of Education computer system, which may be accessed and used only for official Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

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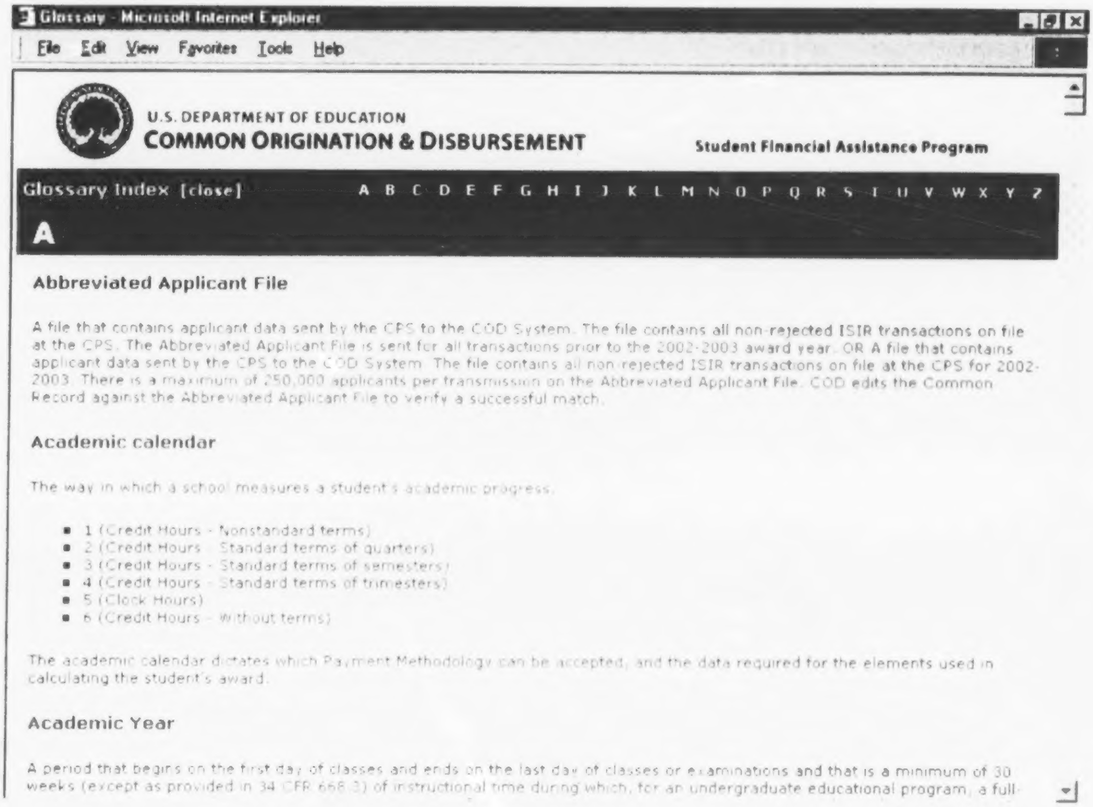
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A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

## A

### Abbreviated Applicant File

A file that contains applicant data sent by the CPS to the COD System. The file contains all non-rejected ISIR transactions on file at the CPS. The Abbreviated Applicant File is sent for all transactions prior to the 2002-2003 award year. OR A file that contains applicant data sent by the CPS to the COD System. The file contains all non-rejected ISIR transactions on file at the CPS for 2002-2003. There is a maximum of 250,000 applicants per transmission on the Abbreviated Applicant File. COD edits the Common Record against the Abbreviated Applicant File to verify a successful match.

### Academic calendar

The way in which a school measures a student's academic progress.

- 1 (Credit Hours - Nonstandard terms)
- 2 (Credit Hours - Standard terms of quarters)
- 3 (Credit Hours - Standard terms of semesters)
- 4 (Credit Hours - Standard terms of trimesters)
- 5 (Clock Hours)
- 6 (Credit Hours - Without terms)

The academic calendar dictates which Payment Methodology can be accepted, and the data required for the elements used in calculating the student's award.

### Academic Year

A period that begins on the first day of classes and ends on the last day of classes or examinations and that is a minimum of 30 weeks (except as provided in 34 CFR 668.3) of instructional time during which, for an undergraduate educational program, a full-

# Appendix F

# Answers

# Session 2

## Individual Learning Activity: #1

### Finding the Information You Need

1. What is the answer to your associate director's question?

   *Edit code 331 will be returned on the origination acknowledgement record when the school submits an Origination ID that is accepted by the Pell processor, then the school submits a second record for the same student where all of the fields match the first record.*

   *School needs to review it to see if it's a duplicate or if an update to one of the fields needs to be made.*

2. What document did you use to get your answer?

   *There are several possible answers.*

   *2002-2003 Federal Pell Grant Program Technical Reference. Note that the learner could also have used Appendix C of the Participant's Workbook where all of the edit codes from the Technical Reference are provided.*

   *2002-2003 Pell Desk Reference*

3. Which Web site did you use to locate that document?

   *SFAdownload*

# Session 2

# Individual Learning Activity: #2

## Finding the Information You Need

1. What document did you use to get your answer?

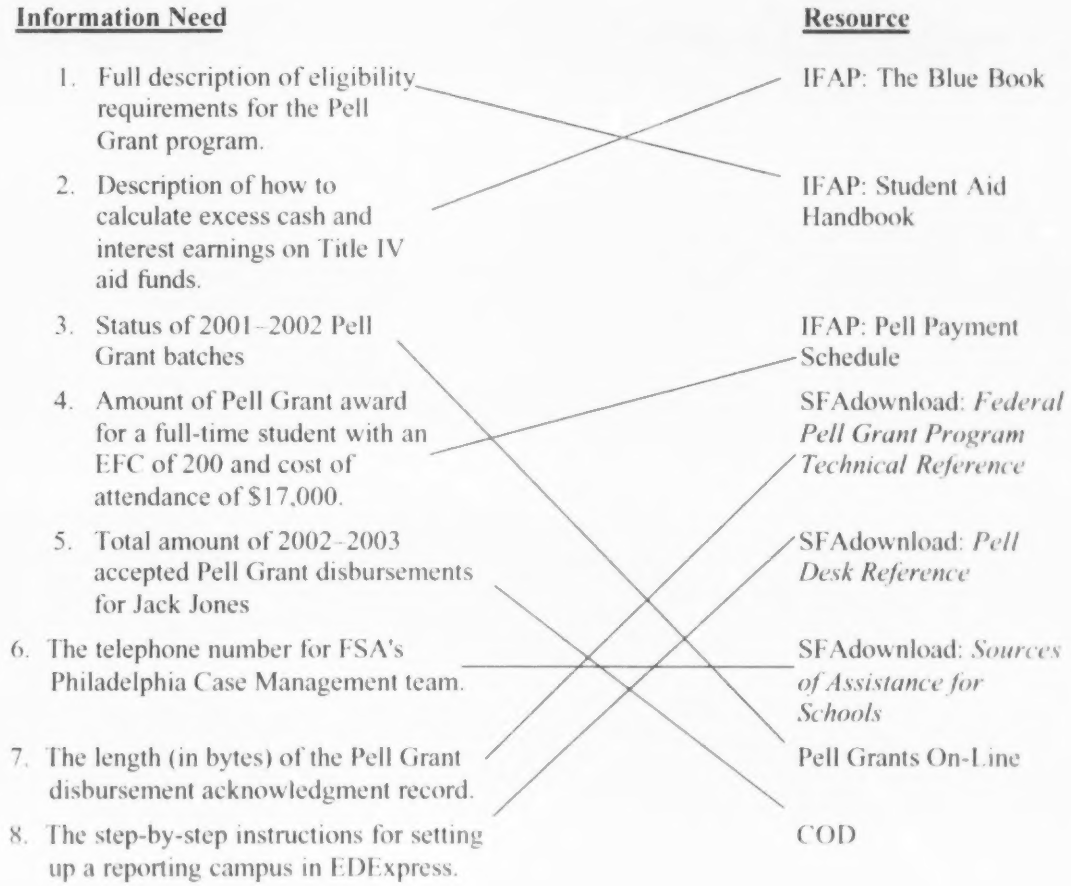
   *Pell Desk Reference.*

2. Which Web site did you use to locate that document?

   *SFAdownload*

# Session 2

## Individual Learning Activity: #3



**Information Need**

1. Full description of eligibility requirements for the Pell Grant program.
2. Description of how to calculate excess cash and interest earnings on Title IV aid funds.
3. Status of 2001–2002 Pell Grant batches
4. Amount of Pell Grant award for a full-time student with an EFC of 200 and cost of attendance of $17,000.
5. Total amount of 2002–2003 accepted Pell Grant disbursements for Jack Jones
6. The telephone number for FSA's Philadelphia Case Management team.
7. The length (in bytes) of the Pell Grant disbursement acknowledgment record.
8. The step-by-step instructions for setting up a reporting campus in EDExpress.

**Resource**

IFAP: The Blue Book

IFAP: Student Aid Handbook

IFAP: Pell Payment Schedule

SFAdownload: *Federal Pell Grant Program Technical Reference*

SFAdownload: *Pell Desk Reference*

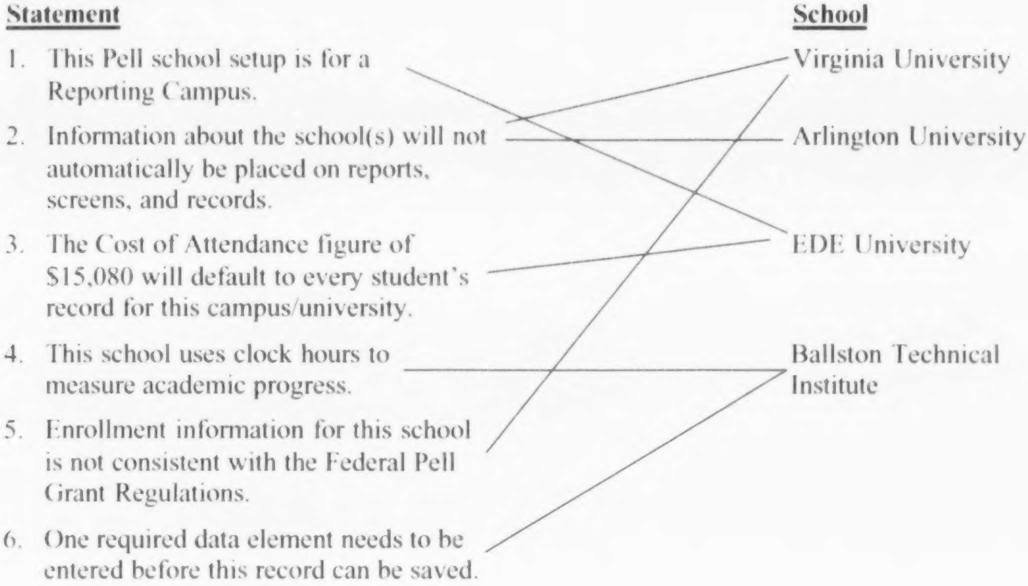
SFAdownload: *Sources of Assistance for Schools*

Pell Grants On-Line

COD

# Session 4

# Individual Learning Activity



**Statement**

1. This Pell school setup is for a Reporting Campus.
2. Information about the school(s) will not automatically be placed on reports, screens, and records.
3. The Cost of Attendance figure of $15,080 will default to every student's record for this campus/university.
4. This school uses clock hours to measure academic progress.
5. Enrollment information for this school is not consistent with the Federal Pell Grant Regulations.
6. One required data element needs to be entered before this record can be saved.

**School**

Virginia University

Arlington University

EDE University

Ballston Technical Institute

*Explanations*

1. *The Attended Campus ID equals the Reporting Campus ID.*
2. *The Default School? check box within the school information box for these schools is unmarked.*
3. *The COA figure in the first field defaults to every student's record.*
4. *The Payment Methodology is 4, which is used by clock-hour schools.*
5. *Enrollment Information box - The value of 5 (clock hours) selected for academic year is a not an accepted value for payment methodology 1.*
6. *The zip code, a required field, has not yet been entered.*

# Session 5

# Individual Learning Activity: #1

True or False

1. *True* — Queries are available in any dialog box where you see the "Selection Criteria" button.

2. *False* — **All** fields available for building a query in the Apps Express module are also available for building a query in the Pell module.

*The fields available for queries are module-specific. Many fields available in the App Express module are not available when building a query in the Pell module. A list of the fields used in the App Express, Global, and Pell modules can be found in Appendix D.*

3. *True* — **All** user-defined fields are available for building a query in the Pell module.

4. *False* — The following is an example of when you would use the Like operator:

(DEPENDENCY STATUS-DEMO LIKE "1")

*You would use = (equal). DEPENDENCY STATUS - DEMO is a one-character field. Like used to search for character patterns in multi-character fields.*

5. *True* — The following query would select all the records of ineligible non-citizens (CITIZEN STATUS-DEMO = "3") and all the records of students attending full-time (ENROLLMENT STATUS = "1")

(CITIZEN STATUS-DEMO = "3") OR (ENROLLMENT STATUS = "1")

6. *True* — The following query would only select the records of full-time, ineligible non-citizens.

(CITIZEN STATUS-DEMO = "3") AND (ENROLLMENT STATUS = "1")

# Session 5

# Individual Learning Activity: #2

| Record Number | Last Name | First Name | Edits/ Comments Returned By Pell | EFC | Accepted Disbursement Amount |
|---|---|---|---|---|---|
| 1 | Bird | Jason | 323 | | |
| 2 | Delph | Jane | | 702 | 1625 |
| 3 | Hart | Fred | 331 | | |
| 4 | Justin | Frank | | 0 | 2000 |
| 5 | Spark | Sue | | 1194 | 1425 |
| 6 | Jay | John | 426 | | |
| 7 | Sanchez | Jose | | 0 | 2000 |

| | | | Enter Record Numbers Here: |
|---|---|---|---|
| (EFC | >= | 0) | *2,4,5,7* |
| (EDITS/COMMENTS RETURNED BY PELL | LIKE | "*331*") | *3* |
| (LAST NAME | < | "J") | *1,2,3* |
| (EFC | = | 2000000002) | *1,3,6* |

*Note that "2000000002" means that there is no numeric value*

| | | | |
|---|---|---|---|
| (ACCEPTED DISBURSEMENT AMOUNT | <= | 1625) | *2,5* |
| (FIRST NAME | LIKE | "RE") | *3* |

# Session 5

# Individual Learning Activity: #3

1. What pre-defined query did you select to modify?

   *EFC RANGE*

2. How would you use this query to help you update the disbursement amount?

   *Schools can use Multiple Entry to update the disbursement date and amount on each record. Here are the steps: ( Note: We will use this query in Session 7, when we discuss Multiple Entry further.)*

   - *Select Process/Multiple Entry/Pell from the menu bar.*
   - *For the Disb. Submit Amount, enter a specific amount one cell off of the Pell Grant award schedule.*
   - *Select the query that you created.*
   - *Enter the EFC range and enrollment status that are associated with the disbursement amount selected.*
   - *Run the query; all selected records are displayed.*
   - *Save the updated disbursement amount to each selected record.*

# Session 5

# Individual Learning Activity: #4

1. What query statement did you create to select records with Concurrent Enrollment?

*Two possible answers:*

*(CONCURRENT ENROLLMENT = "1")*

*(EDITS/COMMENTS RETURNED BY PELL LIKE "*410*")*

2. What other query (s) could you have developed to select records with Concurrent Enrollment?

*See answer to #1 above.*

3. What other queries might be useful in informing you about processing issues or problems?

*Queries using the Edits/Comments Returned by Pell will be useful in flagging problem records. SAR C Flag - Pell is another useful field used in queries to identify records that require follow-up. Encourage the class to share their ideas. Record the ideas on a flip chart.*

4. What exactly is "Concurrent Enrollment?"

*Concurrent Enrollment occurs when another school submits a disbursement record for the same student and the enrollment dates reported on the student's origination records are within 30 days of each other.*

5. Does the system prevent you from disbursing a Pell Grant to a student with a "Concurrent Enrollment"?

*No. As long as the student isn't overawarded, the system doesn't prevent either payment, since the student's enrollment at one school might end before enrollment at the other begins.*

# Session 6

# Individual Learning Activity: #1

1. How many ISIRs were imported?

   *3*

2. What other query, or method, could you have used to identify records processed on a certain date?

   *You could first specify the date in the Processed Date Range fields on the Import dialog, then select the predefined query titled "Not Selected for Verification."*

# Session 6

# Individual Learning Activity: #2

1. *True* You must have an accepted origination record on file at the Pell processor for every student who receives a Federal Pell Grant.

2. *False* Your origination record will be rejected if another school has submitted an origination record for the same student.

3. *False* You are required to disburse Pell Grant funds to the student on the dates you indicate on the origination record.

4. *True* Your origination record will be rejected if the student did not submit a valid, Pell Grant-eligible ISIR.

5. *True* Unless you specify otherwise, EDExpress will always select the Pell-eligible ISIR transaction with the highest transaction to import into the Pell module.

6. *True* If you have more than one Pell-eligible ISIR transaction, you can designate which one to import into the Pell module by using the Transaction Paid On field on the Demo tab.

7. *True* If you select the Import Packaging Records? option, the Pell amount awarded on the Awards tab will import into the Pell module as the Award amount for the entire school year.

8. *False* If you are using a 2001-2002 version of EDExpress, and you select the Import Packaging Records? option, the Pell cost of attendance from the Awards tab will import into the Pell module.
*Note: This is a new feature in the 2002-2003 software.*

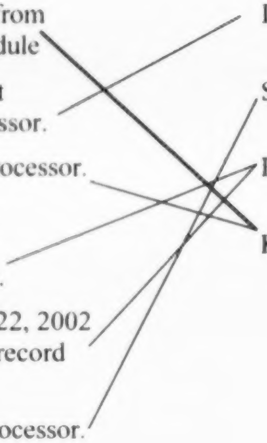
9. *False* Queries used to select ISIRs to import into the Pell module must be developed in the Pell module.
*They must be developed in App Express.*

# Session 6

# Individual Learning Activity: #3

**Statement**

7. This record was created on March 10, 2002 from importing an ISIR from the App Express module
8. The origination record and both disbursement records have been accepted by the Pell processor.
9. This record is not ready to send to the Pell processor. One more data element needs to be entered.
10. Verification has not been completed, and the processor has accepted the first disbursement.
11. The origination record was exported August 22, 2002 and the last disbursement acknowledgement record was imported September 3, 2002.
12. This record is not ready to send to the Pell processor. However, all required data elements are present.



**Student**

Ling L. Woo

Seymour K. Skinner

Doris M. Lunchlady

Kate R. Austin

# Session 7

# Individual Learning Activity: #1

1. How many students on your database have a difference between their original SSN and current SSN? *Two: Wendell Borton and Seymour Skinner (Their original SSN is part of the Origination ID.)*

   Have the origination records for these students been accepted by the Pell processor yet?

   *No. Their origination status is R (Ready) and N (Not Ready).*

   Which report did you use to find your answers? *SSN/Name Differences*

2. How many students appear to have a concurrent enrollment problem? *Two*

   What is the three-digit edit code for a potential concurrent enrollment? *410*

   Which report did you use to find your answer? *Disbursement Batch Summary*

3. What is the name of one of your students who has a concurrent enrollment problem?

   *Wendell Borton*

   Which report did you use to find your answer? *Edits/Comments by Student - Disbursement*

   Has the Pell processor accepted disbursement amounts for this student that equal the Award Amount for the Entire Year? *No*

   Which report did you use to find your answer? *List Disbursements - Pending*

4. Is the sum of reported disbursed amounts equal to the sum of accepted disbursed amounts for the batch that you created on September 3, 2002? *Yes*

   On what date was this batch processed? *September 4, 2002*

   Which report did you use to find your answer? *Disbursement Batch Summary*

5. What is the total dollar amount of remaining disbursements to be created? *$15,725*

   Which report did you use to find your answer? *List—Disbursements Pending*

# Session 7

# Individual Learning Activity: #2

1. How many students are in an overpayment situation? *Two*
2. What are their names? *Ling Woo and Elizabeth Hoover*
3. Did the POP occur on the first or second disbursement record? *Second*
4. Did the processor accept all disbursement records for all the students? *Yes*
5. What is the sum of disbursements in question to these students? *$3,050*
6. When were the origination records for these students processed? *8/23/2002*
7. What query did you develop to identify the students who had received the POP edit code?

   (DISBURSEMENT COMMENTS LIKE "*411*")
8. What reports did you print to get the answers to Questions 1 through 6 above?

   *Answers may vary. The following reports may have been used: Disbursement List and Pell Origination Record*
9. What is the name of the file that the school received informing them of the school who also made Pell Grant payments to these students? *PGMR03OP.001 (MRR)*
10. What is the name of the school? *FSA Community College Note: the exercise requires the class to import the MRR file.*
11. How many days after receiving the file from the Pell processor does the school have to collaborate with the other school and reconcile the discrepancy? *30 days.*
12. What will happen if the two schools do not reconcile the discrepancy? *The Pell processor will generate a "Negative Disbursement" and all previously accepted disbursements for the student will be adjusted down to zero.*

# Session 8

# Individual Learning Activity

4. Has Seymour Skinner's origination record been exported? *No*

5. Was Lillian Price's origination record accepted by the Pell processor? *Yes*

6. When was Lillian Price's origination batch processed by the Pell system? *8/23/2002*

7. When was Lillian Price's origination batch imported into EDExpress? *8/26/2002*

8. How many records were accepted or corrected in Lillian Price's origination batch? *14*

9. When was the MRR batch imported? *Varies according to the system date of the computer.*

10. Three batches of disbursement records have been exported from EDExpress. Have acknowledgement records been imported for all three batches? *Yes*

11. One batch of disbursement records was transmitted with one record having a negative disbursement amount.

    What was the name of the export filename? *C:\IAM\DATA\PGDR03IN.001*

    What is the name of the student whose record was transmitted in this batch?

    *Homer Simpson*